

**Professional Services Proposal for the
CONSULTING SERVICES IN CONNECTION WITH
AMERICAN RESCUE PLAN ACT OF 2021 AND OTHER
LOCAL, STATE, FEDERAL AND PRIVATE GRANT
OPPORTUNITIES**

Jefferson Parish Government

RFP 0447

October 14, 2022

Proposer

Carr, Riggs & Ingram CPAs and Advisors
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Submitted by

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CRI CARR
RIGGS &
INGRAM
CPAs and Advisors
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Dear RFP Evaluation Committee Members:

Carr, Riggs & Ingram, LLC (CRI) appreciates the opportunity to provide this proposal to Jefferson Parish (the Parish). We are excited about the prospect of serving you and for the opportunity to help Jefferson Parish and the local community by assisting in the administration of the American Rescue Plan Act (ARPA) funding.

Established in 1997, Carr, Riggs & Ingram, LLC is a regional certified public accounting and consulting firm with roots going back to 1972. CRI currently has over 2,000 professionals in 30 markets located in ten (10) Southern States. CRI provides accounting, assurance, tax compliance and planning, and consulting services to individuals, businesses (both publicly and privately held), governmental entities, retirement plans, and non-profit organizations throughout the United States.

AMERICAN RESCUE PLAN ACT AND JEFFERSON PARISH

On May 10, 2021, the Treasury Launched the Coronavirus State and Local Fiscal Recovery Funds (SLFRF) program, established by the American Rescue Plan Act (ARPA), which provided \$350 billion of funding to states, local governments, territories, and Tribal governments. The Parish is allocated to receive \$84,006,695 of funding. The Parish is seeking qualified professional administrative consultants for technical and professional services to assist or implement the Parish's responsibilities with respect to satisfying the requirements under the American Rescue Plan Fiscal Recovery Funds. These services will include assistance and support for grant management and associated project management services. Additionally, the consultant is expected to ensure full compliance with federal, state, and local laws to limit adverse actions in subsequent audits and reviews.

BEST FIT TO MEET YOUR NEEDS

At CRI, we believe we are uniquely positioned to best meet the Parish's needs due to our extensive COVID-19 consulting experience, our large local presence with a heavy specialization in the governmental industry, and our in-depth knowledge and understanding of compliance and technical funding requirements from our large audit and single audit practice and our ongoing research performed over ARPA. CRI is a top 25 public accounting firm which offers a broad range of financial and consulting services. Some of our most recent and significant government consulting engagements include our on-going services as the program administrator for the Hurricane Michael relief fund for the State of Florida and the **CARES Act and/or ERAP administration** engagements for Alachua, Bradford, Brazoria, Columbia, Escambia, Martin, and Okaloosa counties and Jefferson Parish, as well as various other clients. In addition, we **recently performed ARPA consulting engagements** for a range of governments including the Mississippi Department of Finance and Administration, Marion County, and the City of Gulfport.

Our government team is highly experienced in providing both audit and consulting services with over 500 current governmental clients and **experience providing consulting services to over 150 government entities**. We are a proud recipient of the Single Audit Resource Center (SARC) award for excellence in knowledge, value, and overall client satisfaction and spent considerable time understanding and educating government accounting practitioners on the new Uniform Guidance; we will leverage this knowledge and understanding to help the Parish maintain compliance with ARPA requirements. In addition, **for over two years, CRI has had a dedicated COVID-19 Task Force** in place to monitor and collaborate on relief bills provided by the Federal Government. As a task force founding member, I can assure you **our knowledge of the latest relief programs is outstanding** and we continue to keep abreast of all the latest guidance through **daily research**. As a **local firm**, it would be a true privilege to pass along our expertise, while playing our part in **assisting our community in rebounding** from the COVID-19 pandemic.

CRI believes in developing long-term, mutually beneficial relationships by tailoring your service team to align their industry, service, and specialty skills with your needs. This customization is reinforced by our commitment to consistent staffing which allows our **dedicated teams** to deliver the highest level of business acumen and knowledge to your organization. At CRI, we believe success is measured by translating complex concepts into client solutions. We look forward to providing solutions to the Parish.

We welcome the opportunity to demonstrate to you the same teamwork, expertise, innovation, and responsiveness that has made us one of the fastest growing public accounting firms in the United States. Again, we appreciate your consideration.

This cover letter meets the requirements of RFP-0447. This CRI Team surpasses the minimum qualifications as listed. We will maintain our professional standards regarding management consulting and all licenses, permits, qualifications, insurance and approvals that are legally required to perform the management consulting services.

The following individual is authorized to commit Carr, Riggs & Ingram, LLC to the contract for this engagement, and should also be contacted regarding the contents of this proposal and quote: Becky Hammond, Assistant Industry Line Leader. We thank you again for the opportunity. If you have any questions about our proposal, or require additional information, please contact Becky Hammond at bhammond@cricpa.com or (985) 290-3684 or Amy Verberne at averberne@cricpa.com or (504) 837-9116.

Becky Hammond, CPA, CISA, CITP, CGAP
Assistant Industry Line Leader

Amy Verberne, CPA
Lead Consulting Partner

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TECHNICAL PROPOSAL





DESCRIPTION OF THE FIRM

SIZE & STRUCTURE

Stretching from North Carolina to New Mexico, Carr, Riggs & Ingram CPAs and Advisors (CRI) is a **top 25 nationally ranked** full-service accounting and advisory firm serving more than 100,000 clients in all 50 states. CRI has over 2,000 professionals, more than 800 of whom are CPAs, and we have been in business and **serving government entities for over 24 years**. We perform a large number of consulting engagements for our governments including various **engagements to administer Disaster finding and COVID-19 funding**. In addition, we are experts in the Single Audit specialty, performing over 220 Single Audits annually, and we are the proud holders of the Single Audit Resources Center's award for Excellence in Knowledge, Value, and Overall Client Satisfaction.

CRI is structured by industry line to allow for our professionals to focus on the industries that best fit their talents and interest. These industry specializations include governments, construction, banking/financial institutions, healthcare, insurance, not-for-profits, and manufacturing and distribution; we are proud of our **more than 710 professionals who dedicate their time to governmental engagements**.



In addition to our consulting expertise, CRI offers traditional and specialized services including audit and assurance, business consulting and support, forensic accounting, IT auditing, SEC compliance, business valuation, and a range of tax services. We believe that our **broad range of skills**, plus our **extensive understanding of controls and compliance** provided by our foundation of performing audits, provides our governmental clients with a tailored service that provides experience, knowledge, and well-rounded perspectives to successfully and effectively administer various programs including Disaster programs.

INCLUSION + DIVERSITY



At the end of the day, we are nothing without our people. We want to ensure that all of our people feel a sense of belonging at CRI by being their true, authentic selves—and respected for what they bring to the table.”

- Bill Carr, CRI Managing Partner

The world in which we live and work is full of complexities and tensions that can have a monumental impact on our communities. Considering how much time our employees spend in their places of work, we must be able to not only address those topics that can cause tensions and complexities, but to do so with openness and compassion.

Research shows that diversity in the workplace environment increases creativity and innovation, promotes higher quality decisions, and enhances economic growth. Because of these factors, among others, Carr, Riggs & Ingram is committed to fostering an inclusive and diverse place for all employees to work in and engage.

When our managing partner and chairman, Bill Carr, signed the CEO Action for Diversity & Inclusion™ pledge, he made a public commitment to building a productive, diverse, and inclusive workplace. The **CEO Action for Diversity & Inclusion™** is the largest CEO-driven business commitment to advance inclusion and diversity within the workplace. Forged by the notion that addressing diversity and inclusion is not a competitive issue, but a societal one, recognizing this commitment starts at the executive level. We are excited that CRI is now a part of more than 50 other leading accounting firms in the nation, and more than 900 of the world's leading companies and business organizations, who are set on leveraging their voices to advancing inclusion and diversity in today's workplace.

We are proud of the people that represent our firm and the culture that our people perpetuate. Together we are committed to working to address issues, facilitate uncomfortable conversations, and learn from one another, all with the sole purpose of driving meaningful change. To learn more about the **CEO Action for Diversity & Inclusion™**, please visit CEOAAction.com.

DESCRIPTION OF THE FIRM



Consulting Services + Government Specialization + Compliance Expertise + Controls Guidance



Consulting Services: Our multi-faceted, experienced team provides extensive consulting services to a variety of governments ranging from small municipalities to large state agencies. Upon the initial administration of CARES Act funding, we consulted with many of our clients to assist them in overseeing various programs to help their citizens and businesses. Our expert teams are able to be **deployed quickly** and **take the burden** of project administration to provide a truly outsourced solution. We are experienced in: establishing and operating call- centers (incorporating both telephone and email communications); designing applications in compliance with grant restrictions; foreign language translation, communication, and document production; creating applications in user-friendly software; performing community outreach; reviewing citizen, business, tenant, and landlord applications; tracking and reporting expenditures; communicating with governance; providing program data and analytics; and various other services in connection with establishing and administering major programs.

Government Specialization: When you have CRI on your side, you have a **team of hundreds of government specialists** within reach with countless years of practice serving entities like yours. These specialists are made available to you to address any range of technical questions you might have, whether those questions be related to accounting guidance and technical standards, governance and structure, financial reporting, perspectives on other governments' interpretations, or whatever else it may be, we know that our experienced team can address your questions.


Compliance Expertise: Our proficiency in performing single audits and government yellow book audits has yielded the firm a high-volume of specialists at our disposal to assist governmental entities in their quests to **maintain compliance with ever-evolving grant requirements**. Our clients benefitted from this invaluable experience most recently when we worked alongside those who were recipients of CARES Act funding to ensure that there was no risk of forced returns of funds due to non-compliance. Those clients are now experiencing a smooth audit process as a result of this compliance guidance.

Controls Guidance: When your government implements major projects, we understand that financial controls may not always be the first thing on everyone's minds, but our experience has shown that they are crucial for the long-term. Our governmental accounting specialists are highly skilled in **identifying control weaknesses and providing control recommendations**. We bring this perspective as part of our consulting services package to protect both the government and the tax-payers from potential control breakdowns.




DESCRIPTION OF THE FIRM

Our team has **managed billions in federal recovery funds** and **serves more than 500 governmental entities** in grants administration, compliance monitoring, and other capacities. The confidence we've built with our clients is derived from our many years of practicing and developing scalable solutions, leveraging our expertise in the government arena. A brief summary of this experience is provided in the graphic below and a longer listing of recent experience is provided in the [QUALIFICATIONS AND EXPERIENCE](#) section.




Florida Division of Emergency Management (FDEM)

Program and grant management support for certain counties handling \$1 billion of ongoing FEMA recovery assistance in the aftermath of Hurricane Michael.



Jefferson Parish CARES Act Relief Funding Support

Compliance support, technical assistance, fraud surveillance, and assistance of funds disbursements to parish residents, businesses, and other organizations as a result of the COVID-19 pandemic.



Deepwater Horizon Oil Spill (BP Oil Spill) Settlement Services

Represented the Plaintiff Steering Committee throughout the negotiation and settlement process and developed/created the business calculation model. We also trained various parties on the model, participated in drafting settlement agreements, and oversaw the process. We directly assisted thousands of claimants throughout the Gulf States by reviewing and analyzing submitted information for required documentation and to ensure the resulting award calculations were accurate. This was a multi- year project which resulted in settlements of \$20 billion, \$8.1 billion of which was related to the committee represented by CRI.

We have performed a vast array of services for governments and **we were among the first firms in the United States performing services surrounding COVID-19-related funding** for state and local governments. **Our projects include hands-on administration of ARPA and other public assistance programs.** As a top-priority client, the Parish will receive the very best that CRI has to offer and your assigned solution team consists primarily of team members that were integral to the recent success of these projects.



SCOPE OF WORK/SERVICES



CRI understands that you are looking for broad-based support services designated to help maximize federal funding, expedite the process and retain funds during the closeout process. We reviewed the scope of work, understand the nature thereof and are willing and capable of providing the services thereof. Services to be performed will include, but are not limited to, the following:

SERVICES REQUESTED	OUR SOLUTION
Work collaboratively with the Department of Public Safety Grants & Administration and any other relevant parish department to conduct a needs analysis and assess priority projects and funding needs.	The team assigned to the project will be ready on day 1 to coordinate with all relevant Parish departments preparing a needs assessment analysis and assessing the priority of each project. Once developed, the team will work to identify additional funding sources for any projects that can be funded outside of the ARPA program. Our extensive experience with both administering large grant projects as well as auditing a large number of federal grants brings us extensive knowledge on the availability of existing funding.
Perform grant funding research for federal, state, foundation, agencies, and organizations that would support the Parish's priority projects and funding needs. Once the funding sources are found, assist the Parish with writing and developing the grant application.	CRI's extensive knowledge of grant programs, along with our ability to research allows CRI to efficiently and effectively identify relevant grant funding that would be applicable to the variety of priority projects that the Parish may identify. Once the funding sources are identified, CRI will systematically develop and execute a process that ensures all grant requests/applications meet the requirements of the grant and include all relevant information necessary to secure the funding.
Provide the Parish with routine updates of potential funding opportunities related to priority areas, including the names of agencies, due dates for applications, eligibility, program summary, and level of funding available.	CRI will maintain a dashboard of all relevant funding sources that will be updated in real time and available to any party that the Parish identifies as needing access. At any point in time, CRI can produce the dashboard to any other party who does not have access. As requested by the Parish, CRI will provide a summary presentation of all identified funding sources, due dates, types of projects, and status of the applications (which will all also be available on our real-time dashboard).
Assist in developing grant policies and procedures to comply with specific grant agreements, including compliance with Uniform Guidance and existing Parish policies.	CRI's extensive experience in auditing numerous federal grant programs, provides us with a strong background in best practices for developing policies and procedures that meet all relevant standards (including Uniform Guidance and specific grant programs). CRI will first work to understand the Parish's existing policies and procedures to determine whether there are any opportunities to instill best practices and then as specific grants are awarded we will assess any additional policy and procedure needs. The policies and procedures developed will ensure the Parish maintains proper documentation that demonstrates compliance with the ARPA funding and any other grant funding, including the monitoring of sub recipients such that if or when the program is audited the Parish can easily demonstrate to the outside auditor that all compliance requirements were met and documented.
Provide technical advisory services related to allowed uses of ARPA funds and respond to questions from the Parish Council and Administration and provide formal opinions regarding the eligibility of specific expenses to be covered by ARPA funds available from federal, state and other sources.	CRI's experience in managing large federal grant awards and performing the audits of large federal grant awards uniquely positions us to efficiently and effectively review relevant guidance to appropriately respond to questions from the Parish Council and Administration as well as provide formal opinions regarding eligibility of specific expenses.
Provide guidance on a technology solution for tracking ARPA funding distribution strategy to sub-recipients.	CRI will provide guidance on the most efficient way to track all things related to grant funding. As discussed earlier, we will prepare dashboards that are updated in real time, not only on the availability of funding sources, but also on each program, the use of the funds, the existing open projects, requests for information on projects, and all things needed to efficiently track and maintain a timeline on the usage of funds.

SCOPE OF WORK/SERVICES



SERVICES REQUESTED	OUR SOLUTION
Develop and execute processes for obtaining, analyzing and gathering field documentation; including, but not limited to, records related to procured goods and services, timekeeping, and force account labor and equipment.	The team will use the knowledge obtained through administering other large federal grant projects, to develop and execute appropriate processes for administration of the program including specific records required to be obtained and maintained for each type of expenditure.
Resolve any requests for information, justification, audit findings, and eligibility appeals.	CRI's process for documenting grant compliance and obtaining and maintaining all relevant information to secure and validate all funding projects, will allow us to efficiently and effectively respond to and resolve any potential information requests, audit findings, or eligibility appeals.
Review and assist with processing payment requests, determining allowable costs.	CRI's process for documenting grant compliance and obtaining and maintaining all relevant information to secure and validate all funding projects, along with our dashboard tracking of all projects will allow us to assist the Parish in reviewing and processing payment requests and assessing the allowability of costs.
Assist with the preparation of project files and responses to any findings and concerns identified during monitoring visits and or audits by any requesting agency.	CRI's process for documenting grant compliance and obtaining and maintaining all relevant information to secure and validate all funding projects, along with our dashboard tracking of all projects will allow us to assist the Parish in preparing project files and responding to any findings or concerns.
Provide the Parish with grant funding close out services to ensure funding is retained.	As part of our process of developing grant specific processes and procedures, appropriate information will be retained throughout the funding period to allow the Parish to file all required close out reports to ensure funding is maintained.

PROJECT SCHEDULE/WORK PLAN



ACTION PLAN: LEVERAGE OUR TEAM'S EXPERIENCE FOR TIMELY EXECUTION

CRI's team is **uniquely positioned** to support the Parish through the intricate complexities of distributing funds from federal agencies because of our robust experience serving governmental entities of all sizes, through grant and other funding management. The following is a standard action plan we designed **based on our previous experience and knowledge of services that have benefitted other cities and Parishes**, and will be **customized to fit your needs**. The depth of experience available from our team allows us to quickly identify the actions necessary to support the Parish's pandemic recovery operations, to **expedite financial recovery** and mitigation utilizing any federal and state programs available, and to ensure full compliance with all federal, state, and local laws in order to limit any subsequent audits and reviews.

ACTION ITEM 1

Assist the Parish in developing appropriate policies and procedures for use of ARPA funds available from federal, state, and other sources.

CRI will review the Parish's existing accounting policies and procedures that apply to grant funding in general, and will assist in identifying improvements and changes to ensure that the policies and procedures satisfy requirements relevant to ARPA funding received from federal, state, and other sources, while maintaining continuity with existing policies and procedures. CRI will also focus on policies and procedures that allow for the most advantageous results for the Parish, while assuring compliance with the requirements of the Uniform Guidance and other applicable federal, state, and local laws and regulations, including procurement policies and subrecipient monitoring requirements. Pre-award activities related to subrecipients, including determining whether a certain entity is a contractor or a subrecipient, and subrecipient risk assessment procedures, will also be considered in these policies and procedures. Tools, such as checklists and approval forms, may also be developed by CRI and the Parish staff as a part of these policies and procedures.

ACTION ITEM 2

Assist the Parish in developing and implementing strategies and plans for the use and coordination of ARPA funds available from federal, state, and other sources.

CRI will use the knowledge assembled by our team of governmental ARPA funding experts to assist the Parish in developing strategies and plans for the use and coordination of the ARPA funding. ARPA funding has different requirements and understanding the purposes for which funds may be used, as well as applicable matching, cost-sharing, and indirect cost requirements, will allow CRI and the Parish to develop an overall strategy and detailed plan for use of the funding to maximize the benefit to the Parish, its residents, its businesses, and nonprofit organizations operating within the Parish. CRI will also use our extensive experience in the grants management and auditing areas to ensure that plans allow for identification of applicable compliance requirements for each funding source, as well as the establishment of effective internal controls over compliance as required by the Uniform Guidance. We will also leverage our knowledge and experience from working with other governments and provide the Parish with suggestions of effective ways which funds can be utilized and demonstrate how other governments are utilizing their ARPA funds. After developing strategies and plans, CRI will work closely with the Parish management and staff, as necessary, to implement the plans efficiently and effectively.

ACTION ITEM 3

Assist the Parish in developing appropriate documentation to demonstrate compliance with ARPA guidance.

CRI will work with the Parish to evaluate all of the existing and future projects which are planned to be funded using the ARPA funds. Multiple Consulting Partners will extensively evaluate each of the projects to determine best recommendations for the Parish to demonstrate compliance with each recommendation being assessed for ease of implementation, effectiveness, and potential consequences. Recommendations will be discussed with the Parish staff and management as necessary to understand and determine the best approach for successful implementation and our final recommendations will be documented in a memo or flowchart format (or both), based on the Parish's preferences.

ACTION ITEM 4

Perform comprehensive compliance and eligibility reviews of uses of the ARPA funds regular basis and in a timely manner to ensure compliance with ARPA guidance and propose corrective actions when necessary.

CRI will perform procedures designed to emulate a Single Audit applied to each funding source. Testing will be performed on a regular basis so there will be multiple rounds of testing to ensure compliance is maintained throughout all of the ARPA projects. These procedures will include tests of compliance with applicable compliance requirements derived from federal, state, and local funding source guidelines, laws, regulations, and the terms of contracts and grant agreements. These procedures will also include evaluation of the Parish's compliance with its own accounting policies and procedures relevant to the ARPA funds. We have assigned Brent Sparkman as the Quality Assurance Consulting Partner to perform the eligibility reviews in order to get a fresh perspective and a critical opinion from an experienced professional that was not involved in the initial planning phase. The timing and scope of the procedures will be tailored

PROJECT SCHEDULE/WORK PLAN



to the Parish's preferences based on collaborative discussions with management. Time is of the essence in expending these funds and in catching any instances of noncompliance. As such, CRI will be available to perform procedures on a predetermined schedule. During this process, CRI will provide timely and relevant feedback, including suggestions for any improvements in Parish policies and procedures that may improve results.

ACTION ITEM 5

Actively search for and share guidance documentation and interpretations of such guidance as it becomes available from ARPA funding entities.

As mentioned above, CRI established a COVID-19 Task Force whose main focus is to track the latest developments on ARPA funding entities' guidance documentation and interpretations and assess their impact on governmental entities. The Task Force includes a Research Team composed of 10 Governmental Partners that searches for new and updated guidance documentation and interpretations on a continuous basis. All new information cultivated from this activity is shared with the group during our regular meetings and then is in turn shared with our clients as applicable. Each of the websites are reviewed regularly and all of the latest guidance identified is summarized in a standardized format and reviewed by the entire Task Force at our regular meetings. All ARPA/COVID-19 related clients are tracked and the Industry Line Leader, Ray Roberts, who heads the Task Force, communicates the latest applicable guidance to all teams providing ARPA/COVID-19 related services to government entities. Your team will communicate the specific details of all new guidance and work with management to ensure the implementation is tailored to your circumstances. If teams have any questions on how to implement the guidance they contact the Task Force and the appropriate Research Team member will walk them through the specific details. The entire process is overseen by the Industry Line Leader with the assistance of two Industry Line Sub-Leaders, one of which is Becky Hammond, who ensure that no items are missed. Your engagement team will consist of three members of the Task Force, who will notify management immediately upon discovery of any new guidance documentation and interpretations that will affect the Parish. The consulting team will then set up a meeting with the Parish to discuss the new guidance/interpretations.

ACTION ITEM 6

Actively search for and share plans and practices from other US Parishes/Counties with regard to the use of ARPA funds available from federal, state and other sources.

A part of our COVID-19 Task Force's responsibilities are to search various websites for new laws and regulations, and activity, that could impact our clients. Our COVID-19 Task Force is charged with monitoring the specific plans of individual states throughout the Parish. During our bi-weekly meetings, we share all best practices developed or observed. Based on these meetings, we would have a similar meeting with the Parish to share those processes. At that time, we would help the Parish in what, if any, of these practices would be beneficial for your specific circumstances.

ACTION ITEM 7

Respond rapidly to questions from the Parish and provide formal opinions regarding the eligibility of specific Parish expenses to be covered by ARPA funds available from federal, state and other sources.

The engagement team will be on hand to rapidly respond to questions from the Parish. Although we are a large firm, we have a regional presence and you will receive the level of close personal service that you would expect from a local firm, including rapid responses to emails and calls. CRI is prepared to offer the Parish formal opinions regarding the eligibility of specific Parish expenses to be covered by ARPA funds from various sources. Based on our COVID-19 task force's continued research and our COVID/ARPA experiences we will be able to determine if the expenditure will qualify for reimbursement. In the rare case where more information is needed, we have relationships with law firms familiar with ARPA to give us their opinion on the eligibility of the expenditure. All time billed for the attorney opinions will be billed at the same rate as CRI Partners. Consistent with the approach we have successfully taken with previous clients, we will provide our responses in clearly documented memo format, citing applicable technical guidance and evidence, so that the Parish has supporting documentation for its position to be able to easily provide to potential future auditors or reviewers.

ACTION ITEM 8

Provide strategic advice and guidance on how best to use ARPA funds in conjunction with other Parish funding sources.

Drawing from our experience with our existing client base (both COVID specific and government experience in general), we will develop and provide strategic advice and guidance on how best to utilize ARPA funds. In addition, we have operated in all 50 states, which exposes us to a wide variety of best practices. We will use all that experience to maximize your funding and to coordinate ARPA funding with existing current Parish funding, to achieve optimal results. We will share our knowledge with the Parish during various meetings with the Parish staff.

PERIOD OF AGREEMENT



CRI understands the term of any resulting contract to be for three (3) years commencing on January 1, 2023, and shall expire on December 31, 2025 (hereinafter the 'Original Term'). The Parish has the option to pursue one, two (2) year extension (hereinafter the 'Option') depending on the severity of recovery needs. This Option can only be exercised by the Parish, and by a formal written Amendment approved by Jefferson Parish Council.



DELIVERABLES

PROCESS DELIVERABLES

CRI will design, implement, and document ARPA (and any other grant or other funding source identified and procured) processes and procedures necessary to successfully obtain reimbursements for expenditures related to the funding project. Processes will include all necessary controls and documentation requirements to satisfy future audit requests for appropriate use of the federal funds. Process deliverables will include step-by-step guidelines for each task in the process to enable quick and easy adjustments as may be necessary for future projects.

DOCUMENTATION DELIVERABLES

Documentation deliverables can be tailored to the Parish's requests. Documentation deliverables are expected to include databases using SmartSheet to organize and manage all funding sources, funded projects, sub recipients, receipt of all supporting documents. Smartsheet is a modern work management tool that offers a varied set of views, workflows, reports, and dashboards to capture and track information. Automated notifications can be set up for continuous monitoring and oversight. It contains formatting, linking, and calculation functionality to allow the user to create the product that works for each individual product. CRI uses SmartSheet in a variety of ways to communicate with clients and to track and monitor internal information as well.

We will design and implement Excel spreadsheets to assist in tracking and monitoring expenses for each project worksheet to ensure complete and accurate support for all reimbursement amounts. Parish personnel will have full and complete access to all Excel spreadsheets and all Smartsheets in order to be able to monitor the process and provide data to future auditors easily. CRI will provide SmartSheet training to any and all Parish employees necessary as part of this engagement. Research obtained as a result of this engagement will be documented within the related SmartSheets and available for current and future use of Parish employees.

PROJECT CLOSE OUT DELIVERABLES

At the end of each project and each funding period, CRI will work with the Parish to tailor the deliverable to ensure it meets all relevant grant guidelines and the needs of the Parish.



FINANCIAL PROFILE



FINANCIAL PROFILE



As a privately held company, CRI does not procure independently audited financial statements. Our Balance Sheet and Statement of Income for the last three fiscal years are provided below and on the following page, followed by a letter from our bank. Please treat these pages as **confidential after contract award as it contains our private financial information**.

CARR, RIGGS & INGRAM, LLC – INCLUDING PORTFOLIO COMPANIES

As of September 30,	BALANCE SHEET		2019	Reclassified 2018
ASSETS				
Current Assets				
Cash and cash equivalents	\$	20,949,536	\$	16,213,912
Accounts receivable (net of reserve)		49,610,761		46,091,761
Due from affiliated companies		908,022		1,303,115
Work in process (net of reserve)		16,069,991		17,248,360
Prepaid expense		2,570,106		2,336,944
Total current assets		90,108,416		83,194,092
Non-Current Assets				
Property and equipment (net)		7,968,269		8,971,948
Investments in affiliated companies		1,030,044		-
Other non-current assets		15,063,950		13,658,940
Total non-current assets		24,062,263		22,630,888
Total Assets	\$	114,170,679	\$	105,824,980
LIABILITIES AND MEMBERS' EQUITY				
Current Liabilities				
Accounts payable	\$	\$539,534	\$	1,621,604
Accrued other		926,553		622,944
Accrued payroll and 401k contributions		5,300,437		4,819,649
Current portion of long-term debt		35,421,169		28,172,997
Notes payable partners		4,434,092		8,406,243
Total current liabilities		46,621,785		43,643,437
Non-Current Liabilities				
Long-term debt		21,551,622		16,725,396
Total non-current liabilities		21,551,622		16,725,396
Members' Equity		45,997,272		45,456,147
Total Liabilities and Members' Equity	\$	\$114,170,679	\$	105,824,980

For the years ending September 30,	STATEMENT OF INCOME		2019	Reclassified 2018
Revenue	\$	309,922,773	\$	296,036,479
Operating Expenses				
Salaries		134,811,803		127,493,969
Benefits		13,015,957		13,064,124
Payroll taxes		9,575,826		9,176,626
Advisory Fees		11,206,235		12,693,400
Bad debts		4,540,640		5,353,009
Client expense		4,069,211		4,887,425
Computer and software expense		7,464,554		7,304,623
Consulting fees		443,027		475,455
Continuing education		727,182		2,390,955
Contract labor		532,694		819,906
Depreciation		3,363,340		3,052,165
Equipment lease		334,068		359,248
General operating expense		3,546,713		4,469,102
Insurance		2,249,007		2,034,624
Office expense		8,229,188		8,955,237
Partner life insurance		1,424,954		1,260,584
Professional fees		2,294,695		2,069,223
Promotional expense		2,272,623		2,641,808
Rent		16,539,677		15,731,864
Retirement - Partners		7,385,067		6,737,452
Total operating expenses		234,026,461		230,970,799
Operating Income		75,896,312		65,065,680
Interest (net)		(1,959,791)		(1,245,581)
Other income (expense)		769,300		1,727,157
Net Income	\$	74,705,821	\$	65,547,256

FINANCIAL PROFILE



CARR, RIGGS & INGRAM, LLC – INCLUDING PORTFOLIO COMPANIES

As of September 30,	BALANCE SHEET		2020	2019
ASSETS				
Current Assets				
Cash and cash equivalents	\$	40,276,752	\$	20,949,536
Accounts receivable (net of reserve)		44,842,052		49,610,761
Due from affiliated companies		610,359		908,022
Work in process (net of reserve)		16,999,736		16,069,991
Prepaid expense		4,017,393		2,570,106
Total current assets		106,746,292		90,108,416
Non-Current Assets				
Property and equipment (net)		7,617,360		7,968,269
Investments in affiliated companies		1,361,448		1,030,044
Other non-current assets		16,244,177		15,063,950
Total non-current assets		25,222,985		24,062,263
Total Assets	\$	131,969,277	\$	114,170,679
LIABILITIES AND MEMBERS' EQUITY				
Current Liabilities				
Accounts payable	\$	532,757	\$	\$539,534
Accrued other		894,245		926,553
Accrued payroll and 401k contributions		8,723,800		5,300,437
Line of credit		15,491,500		28,487,022
Current portion of long-term debt		16,059,794		6,934,147
Notes payable partners		4,451,982		4,434,092
Total current liabilities		46,154,078		46,621,785
Non-Current Liabilities				
Long-term debt		18,573,433		21,551,622
Total non-current liabilities		18,573,433		21,551,622
Members' Equity		67,241,766		45,997,272
Total Liabilities and Members' Equity	\$	131,969,277	\$	114,170,679

For the years ending September 30,	STATEMENT OF INCOME		2020	2019
Revenue	\$	321,040,184	\$	309,922,773
Operating Expenses				
Salaries		134,078,268		134,811,803
Benefits		13,272,080		13,015,957
Payroll taxes		9,594,884		9,575,826
Advisory Fees		14,010,996		11,206,235
Bad debts		3,577,088		4,540,640
Client expense		3,648,228		4,069,211
Computer and software expense		8,032,562		7,464,554
Consulting fees		481,463		443,027
Continuing education		448,122		727,182
Contract labor		338,056		532,694
Depreciation and Amortization		3,536,392		3,363,340
Equipment lease		284,953		334,068
General operating expense		3,311,431		3,546,713
Insurance		2,905,948		2,249,007
Office expense		8,365,759		8,229,188
Partner life insurance		1,501,850		1,424,954
Professional fees		1,173,155		2,294,695
Promotional expense		1,887,830		2,272,623
Rent		17,928,510		16,539,677
Retirement - Partners		7,080,688		7,385,067
Total operating expenses		235,458,263		234,026,461
Operating Income		85,581,921		75,896,312
Interest (net)		(1,751,124)		(1,959,791)
Other income (expense)		1,737,838		769,300
Net Income	\$	85,568,635	\$	74,705,821



QUALIFICATIONS AND EXPERIENCE



FIRM EXPERIENCE



CRI's team is highly capable of administering COVID-19 and ARPA grants for the Parish; our proposed solution will be designed to achieve the desired outcomes by leveraging our breadth of related experience. The table below briefly summarizes some of CRI's governmental consulting **clients we have served in the past three years**. The following three pages provide in-depth descriptions of a few of these.

Florida Division of Emergency Management Disaster Relief administration including expenditure review, eligibility assessments, tracking and monitoring of expenditures, and applicant coordination.	Mississippi Department of Finance and Administration CARES and ARP Act administration including project planning and decision making, expenditure and application review, portal implementation, and monitoring and reporting.	Mississippi Office of the Governor CARES Act administration including project planning, expenditure and application review, and monitoring and reporting. Additional services included technical research and eligibility determinations.
Alachua County CARES Act and ERAP housing program administration including portal implementation, and application design and review. Also included eligibility determinations, call-center services, and providing extensive assistance to applicants.	Brazoria County ERAP housing program administration services including staff training, portal implementation, application design, and application reviews, and eligibility determinations. Also included callcenter services and providing assistance to applicants.	Mississippi State Auditors Office CARES Act administration including expenditure review, expenditure monitoring and tracking, project planning and design, and reporting assistance. Technical guidance was researched and eligibility determinations were required.
Marion County American Rescue Plan Act advisory services to assist the County maintain develop its spending plan. Services include: compliance guidance, assessing eligible expenses, and records maintenance.	Bradford County CARES Act administration including application design, implementation and review, inspecting supporting documents, making eligibility determinations, and preparing technical guidance memos.	City of Gulfport American Rescue Plan Act (ARPA) services to assist the City on an as-needed basis in obtaining and maintaining funding as well as providing compliance support and technical assistance.
Jefferson Parish CARES Act consulting and reimbursement processing including identification of eligible expenditures and gathering and tracking of documentation.	Columbia County CARES Act administration including portal implementation, and application design and review.	Escambia County CARES Act compliance guidance and documentation review.
Dixie County Process and controls recommendation and implementation including compliance guidance.	Martin County CARES Act compliance and sub-recipient guidance and audit support.	Pinellas Community Foundation CARES Act compliance and sub-recipient guidance and controls design and implementation.

SERVICES PROVIDED

The summary below shows some of the specific services we have provided to governmental clients:

- **Application design, tailoring and launch**
- **Application 1st and 2nd reviews**
- **Tracking program expenditures**
- **Making eligibility determinations**
- Compliance research and presentation
- **Preparation of audit documentation**
- Performing community outreach
- Providing guidance on eligibility and compliance
- **Rapid program implementation**
- Producing compliance and eligibility memos
- **Establishing a call-center for applicants**
- **Communicating program requirements to applicants**
- Managing applicant correspondence
- Multiple foreign language correspondence options
- Drafting sub-recipient agreements
- Communicating regularly with governance
- Controls and compliance recommendations
- **Designing and performing controls**
- **Preparing required state/federal reports**

REFERENCES

We are very proud of the client services we have provided, and are currently providing, to our government consulting clients, in particular our COVID-19 solutions which were implemented rapidly during very challenging circumstances. We are especially proud of the extent to which we are able to ease the administrative burden on our clients and the help that has been provided to their citizens as a direct result of the solutions provided. Below are a few references for this work; we hope you contact them to hear of the great service they received.

CLIENT NAME & CONTACT INFORMATION	SERVICES & DATES PROVIDED	\$ AMOUNT OF FUNDING BEING ADMINISTERED
Jefferson Parish, LA Madison C. Martin <i>Director of Accounting</i> 504.364.2781 mmartin@jeffparish.net	Program Consultant; April 2020 - December 2020 <ul style="list-style-type: none"> • Technical research and compliance guidance • Fulfilling state reporting requirements for expenditure reimbursement • Gathering and maintaining expenditure support • Strategic project planning 	Coronavirus Relief Fund: \$70m
Brazoria County, TX Kaysie Stewart <i>County Auditor</i> 979.313.6662 KaysieS@brazoria-county.com	Program Administrator; April 2021 - Present <ul style="list-style-type: none"> • Program design and development • Application software implementation • Application design, review, and approval • Call center set-up and management • Ongoing compliance guidance 	ERA Program: \$11.3m
Alachua County, FL Todd Hutchison <i>Finance Director</i> 352.337.6205 nth@alachuaclerk.org	Program Administrator; July 2020 - Present <ul style="list-style-type: none"> • Individual and business assistance program creation, review, call center and appeals process • ERA program design and creation of the application • Liaising with state agencies • Providing documentation to support expenditures 	Coronavirus Relief Fund: \$46.9m ERA 1 Program: \$8.1m ERA 2 Program: \$9.7m
Mississippi Department of Finance and Administration Liz Welch <i>Executive Director</i> 601.359.6603 liz.welch@dfa.ms.gov	Program Administrator; May 2020 - Present <ul style="list-style-type: none"> • Project planning and decision making • Expenditure and application review and verification • Tracking and monitoring of expenditures • Report preparation and submission 	Coronavirus Relief Fund: \$115m
Florida Division of Emergency Management Jon Bussey <i>Chief of Staff, Director's Office</i> 850.815.4178 jon.bussey@em.myflorida.com	Program Administrator; May 2020 - Present <ul style="list-style-type: none"> • Hurricane Michael Disaster Recovery Funds for Calhoun, Holmes, Okaloosa, and Washington Counties Oversight and Grant Administration 	Disaster Relief Funds: \$1bn



YOUR SOLUTION TEAM

Becky Hammond, CPA, CISA, CITP, CGAP **Assistant Industry Line Leader** **Principal**



With over 22 years of experience serving a wide variety of government clients, Becky has an exceptional level of technical expertise and she is a proven, successful leader of major projects. She was a founding member of our COVID-19 Task Force which was established early in 2020 to provide CRI with a coordinated approach to digesting all of the latest guidance relating to COVID-19 funding and synthesizing it into a format that can be easily communicated and understood by our clients. As part of her role on the COVID-19 Task Force, Becky has performed extensive research of the requirements of the ERA program and she has a detailed understanding of the latest technical guidance provided by the Treasury.

Becky led the financial statement and Single Audit for Jefferson Parish for the years ended December 31, 2018 and 2019 as well as the CARES Act consulting engagement with Jefferson Parish, where she assisted the Parish with the processing of \$70m of CARES Act funds. She also led the Emergency Rental Assistance Program for Brazoria County administering over \$20m in funding to tenants and landlords. Becky's experience provides exceptional insights into governmental operations and her ability to anticipate and prevent project difficulties and control weaknesses is hugely valued and appreciated by her clients.

Amy Verberne, CPA **Lead Consulting Partner** **Program Manager and Audit Specialist**



Amy has over 20 years of experience in public accounting in serving governmental clients, including county governments, municipalities, and charter schools. She has led internal audit, external audit, forensic and consulting engagements of governmental entities. She serves on CRI's internal inspection team and also teaches governmental and Uniform Guidance technical topics to CRI professionals.

She will directly interface with the Parish and will plan, supervise, and review the program administration.

Angela Wilcox, CPA **Consulting Senior Manager** **Financial Subject Matter Expert**



With over 25 years of combined professional experience in public accounting and with a large local non-profit organization, Angela has provided extensive auditing services and internal auditing services to a variety of non-public, not for profit and local government entities. Angela has successfully managed a variety of large, complex projects and has been the main point of contact. As a critical thinker with great capacity to process information and an extensive knowledge base from her experience, Angela has helped clients navigate complex projects. Her work ethic and commitment to provide quality service to her clients has been integral towards nurturing positive client relationships.

Brent Sparkman, CPA, CFF, CITP

Quality Assurance Consulting Partner



With over 25 years of experience, Brent has provided a wide range of consulting services to the State of Florida related to State programs and grant management support. Brent is currently the engagement partner and contract manager for the existing contract with the Florida Department of Economic Opportunity Office of Long Term Resiliency for implementation support services of the HUD \$600+ million CDBG-MIT grant program. Brent serves in this same role for FEMA's \$1 Billion ongoing disaster recovery assistance for Hurricane Michael for the State of Florida's Division of Emergency Management Bureau of Recovery.

In these roles, Brent provides support to the project managers, assisting in all aspects to ensure project objectives are met and exceed the client's expectations. Brent will often take on challenging aspects of these projects collaboratively with the Division/Agency leadership to ensure difficult or complex matters are thoroughly considered and the correct decisions are made so projects move forward efficiently. Brent enjoys collaborating directly with the bureau chief, contract manager and other leadership providing strategic thinking on the implementation and delivery of complex large projects. Brent measures his success by the success of those with whom he works.

Allison Nocito



Consulting Senior Project Analyst/Coordinator and Clerical Support

From her 3 years of experience, Allison has worked on a variety of consulting, tax, and traditional attest projects. She has most recently been the project lead on the Brazoria ERAP grant administration, overseeing all staff on the engagement and being critical to the processing of applications through to payment. Allison's ability to effectively train the team and her organized approach to the overall project has created tremendous efficiency which she will be able to carry over into the ARPA grant administration project.

Keith Robinson



Engineer A&E Subject Matter Expert

Keith earned his undergraduate degree in mechanical engineering from Louisiana State University in 1992 and his MBA from Tulane University in 1997. He has experience as an industrial process and design engineer as well as a consulting mechanical engineer on a wide variety of capital and construction projects. In both fields he has been involved in all phases of mechanical design, calculations, analysis, and drawing approval. He has experience performing engineered cost segregation analyses since 2012 for clients in various industries including automotive, banking, hotels, manufacturing, retail, restaurants, grocery stores, and healthcare.

Additional Team Members

Consulting Seniors and Staff



In addition to the management and supervision team described above, we will leverage a number of senior and staff level team members to ensure the project is executed efficiently and effectively. The senior and staff level team members will primarily be responsible performing the first reviews of each application and corresponding with applicants with an experienced senior being designated to oversee each of these activities.

GOVERNMENTAL EXPERIENCE



CRI'S GOVERNMENT AUDIT EXPERIENCE

Our extensive government experience firm-wide is summarized below. This experience has given our team members an in- depth understanding of state and local government, the areas of concern, and areas in which these engagements differ from commercial or non-profit audit work.

CRI'S GOVERNMENTAL EXPERTISE



Audit and Consulting Services for

500+ governmental
entities with annual revenues
totaling **\$24 Billion**



220+ single audits performed annually

Consulting and other agreed upon
procedures engagements for
150 government entities



Single Audit Resource Center's
Award for Excellence in Knowledge,
Value, and Overall Client Satisfaction



Member of AICPA's Government
Audit Quality Center



Governmental Partner Designations

Including: CPA, CGFM, CITP, CFE, CMA, CISA,
CGEIT, CTGA, CFF, CGMA, and CGAP

CLIENTS WITH ANNUAL REVENUES UP TO:



90+ School Districts
\$1.1 Billion



100+ Municipalities
\$1.8 Billion



60+ Agencies/Authorities
\$3 Billion

COMPLIANCE RESOURCES



AWARD WINNING SINGLE AUDIT SERVICES

Our governmental team performs single audits of federal funds for more than 220 separate entities annually. Industry Line Leader Ray Roberts formerly served as the Governmental Taskforce Chairperson for the AICPA Technical Issues Committee. Ray is an original member of the AICPA Government Audit Quality Executive Committee, and has served as a technical reviewer for the AICPA Single Audit Guide. We are highly skilled in providing efficient and knowledgeable single audit engagements and our work has been acknowledged by the **Single Audit Resource Center with their highly prestigious award for excellence in knowledge, value, and overall client satisfaction.**

Our single audit practice is overseen by Gwen Mansfield- Vogt who is assigned to your engagement as a Compliance Consulting Partner. Gwen has been involved in approximately 1,000 single audits during her career and she reviews all of the single audits that CRI performs, providing her an extremely high level of specialization in this area.



In addition, Gwen has performed inspections of the single audit practices of other CPA firms as a subcontractor for the AICPA. She has also created a number of federal single audit tools and templates that are used on all of CRI's audits to make them more efficient and effective.

Single audits are an important part of what we do as a firm and a major area of specialization. We are proud of our 10+ professionals who have earned the AICPA's **Advanced Single Audit Certification**, and are excited about the additional professionals that have earned the Intermediate Certification and are now studying for the advanced certificate.

COVID-19 RESOURCES

It's no secret that the COVID-19 pandemic turned the world on its head. Businesses, governments, families, schools —none of us are exempt from the impacts of this unprecedented public health and economic crisis. To that end, CRI's dedicated COVID-19 Response Task Forces have curated a robust collection of original tools and resources to assist in making critical decisions during this ever-changing time.

This tool kit includes articles, alerts, downloadable collateral, podcast episodes, and our Quick Hits webcasts—short, 30-minute webinars focused on topics directly related to the impact that COVID-19 has had on our economy, and in turn, businesses and organizations of all sorts.

For all of CRI's COVID-19 Resources, please visit CRIcpa.com/covid-19-resources.





ATTACHMENTS



ATTACHMENT A - INSURANCE



CERTIFICATE OF LIABILITY INSURANCE

CARRR-2 OP ID: JR

DATE (MM/DD/YYYY)
09/08/2022

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

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

PRODUCER Whittaker-Warren Insurance P.O. Box 311283 Enterprise, AL 36331 Forrest J. Warren		CONTACT NAME: Forrest J. Warren PHONE (A/C, No, Ext): 334-347-2631 FAX (A/C, No): 334-393-2345 E-MAIL ADDRESS: Jennifer@whittakerwarren.com	
		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Continental Casualty Company	
		INSURER B: American Casualty Company of	
		INSURER C: Continental Insurance Company	
		INSURER D:	
		INSURER E:	
		INSURER F:	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	X	X	6045711126	01/07/2022	01/07/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 Emp Ben. \$ 1,000,000
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS			6045711112	01/07/2022	01/07/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10000			6045711143	01/07/2022	01/07/2023	EACH OCCURRENCE \$ 20,000,000 AGGREGATE \$ 20,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	6045689709	12/31/2021	12/31/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Certificate holder is additional insured with regard to general liability where required by written contract. Policy includes a waiver of subrogation in favor of the certificate holder where required by written contract.

CERTIFICATE HOLDER CITYNOL	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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ACORD 25 (2014/01)

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ATTACHMENT B – SIGNING AUTHORITY



AFFIDAVIT

State of Louisiana

Parish of Orleans

BEFORE ME, the undersigned Notary, Mark Embree, on this 8th day of April, 2022, personally appeared Rebecca Hammond, known to me to be a credible person and of lawful age, which being by me first duly sworn, on his oath, deposes and says:

THAT Carr, Riggs & Ingram, LLC is wholly owned by its equity partners (see attached listing of equity partners); and

THAT Carr, Riggs & Ingram, LLC has no other persons other than its equity partners holding an ownership interest in Carr, Riggs & Ingram, LLC via a counter letter or otherwise.

Rebecca Hammond, CPA
111 Veterans Blvd, Suite 350
Metairie, LA 70005

Subscribed and sworn to before me, this 8th day of April, 2022.

Notary

NOTARY PUBLIC

My commission expires: At death, 20__.



ATTACHMENT B – SIGNING AUTHORITY



Payroll Name	Work Email	Physical Location
Abney, Kenneth John	kabney@cricpa.com	New Orleans LA
Abrams, Scott M.	sabrams@cricpa.com	Atlanta GA
Acker, Norman J	nacker@cricpa.com	Corpus Christi TX
Alberdi, Debra M.	dalberdi@cricpa.com	Tampa Bay FL
Albert, James Y.	jalbert@cricpa.com	Dallas TX
Alexander, Debra Lynn	dalexander@cricpa.com	Austin TX
Alvarez, David	dalvarez@cricpa.com	Auditwerx - Tampa FL
Amiss, David Edmund	damiss@cricpa.com	Raleigh NC
Anderson, Louise H.	landerson@cricpa.com	Jacksonville FL
Anderson, Quentin N.	qanderson@cricpa.com	Harlingen TX
Aponte, Jose	jraponte@cricpa.com	New Orleans LA
Applewhite, Sara	sapplewhite@cricpa.com	Marianna FL
Austin, William O.	baustin@cricpa.com	New Bern NC
Averett, Bruce	baverett@cricpa.com	Enterprise AL
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Bargaleski Hill, Alyssa R.	ahill@cricpa.com	Houston TX
Barksdale, Joseph Brian	bbarksdale@cricpa.com	Birmingham AL
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Bergeron, Donna S	dbergeron@cricpa.com	Tallahassee FL
Berry, Marc S A	mberry@cricpa.com	The Woodlands TX
Betts, Richard W	rbetts@cricpa.com	Nashville TN
Bolger, Aileen	abolger@cricpa.com	Atlanta GA - Premier Plaza
Bollinger, Romas Kelly	kbollinger@cricpa.com	Atlanta GA
Borcheck, Michael S	mborcheck@cricpa.com	Orlando FL
Boteler, Gary H.	gboteler@cricpa.com	Atlanta GA
Broline, Robert L.	rbroline@cricpa.com	Melbourne FL
Brown III, Glenn William	skip.brown@cricpa.com	Mobile AL
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Cain, Chris	ccain@cricpa.com	Birmingham AL
Cardillo, Christina M	CCardillo@cricpa.com	Melbourne FL
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Carr, William H.	bcarr@cricpa.com	Enterprise AL
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Copeland, B. Martin	mcopeland@cricpa.com	Oneonta AL

ATTACHMENT B – SIGNING AUTHORITY



Payroll Name	Work Email	Physical Location
Crabtree, Gregory Burgess	greg.crabtree@cricpa.com	Huntsville AL
Crowder-McCoy, Nancy Barbour	nmccoy@cricpa.com	Stuart FL
Davis, Tom C.	tdavis@cricpa.com	Valdosta GA
DeMarco, David P.	ddemarco@cricpa.com	Nashville TN
Demonbreun, Robert M	rdemonbreun@cricpa.com	Nashville TN
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Grant, Adrian M	amgrant@cricpa.com	Atlanta GA
Grant, Andrew K	akgrant@cricpa.com	Atlanta GA
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Gruters, Timothy R	TGruters@cricpa.com	Sarasota FL
Gunning, Matthew G.	mgunning@cricpa.com	Atlanta GA
Guy, Sandra Sokol	sguy@cricpa.com	Goldsboro NC
Habib, David J	dhabib@cricpa.com	Corpus Christi TX
Hall, Bryan	bhall@cricpa.com	Enterprise AL
Hall, Keisha	khall@cricpa.com	Corp-Enterprise AL
Hall, William Franklin	wfhall@cricpa.com	Jacksonville FL
Hammond, Rebecca Prater	bhammond@cricpa.com	New Orleans LA
Hardister, Pamela D	phardister@cricpa.com	Atlanta GA - Premier Plaza
Hariel, Wendell Shane	shariel@cricpa.com	Jackson MS
Harpe, Jason K.	jharpe@cricpa.com	Birmingham AL
Harper, Miles D.	mharper@cricpa.com	Houston TX

ATTACHMENT B – SIGNING AUTHORITY



Payroll Name	Work Email	Physical Location
Schumpert, Scott	sschumpert@cricpa.com	Nashville TN
Scott, Michael A.	msscott@cricpa.com	Panama City Beach FL
Sedwick, Arthur James	jsedwick@cricpa.com	Corpus Christi TX
Segovia, David	dsegovia@cricpa.com	McAllen TX
Sexton, Chad A.	csexton@cricpa.com	Atlanta GA
Sharp, Gary K.	gsharp@cricpa.com	Nashville TN
Shearer, David William	DShearer@cricpa.com	Goldsboro NC
Shell, Sandra M	sshell@cricpa.com	Santa Fe NM
Shinn, Byron E	BShinn@cricpa.com	Bradenton FL
Shinn, Garrett B	GShinn@cricpa.com	Sarasota FL
Shipley, Kellie J	kshipley@cricpa.com	Corpus Christi TX
Shuping, Mary April	ashuping@cricpa.com	Gainesville FL
Sidrony, Katie Emilee	ksidrony@cricpa.com	Destin FL
Sietsma, David S.	dsietsma@cricpa.com	Tampa Bay FL
Sikes, Joel E.	joel@criadv.com	CRI Capital Advisors - Montgomery AL
Silver, Jeffrey	jsilver@cricpa.com	Atlanta GA
Simms III, Joseph Thomas	jtsimms@cricpa.com	Shreveport LA
Simpson, Kristen A.	ksimpson@cricpa.com	Houston TX
Sims, Elton H.	esims@cricpa.com	Jackson MS
Sims, John S.	ssims@cricpa.com	Tifton GA
Singletery, Mason C.	csingletery@cricpa.com	Montgomery AL
Skinner, George Alan	GSkinner@cricpa.com	Corp-Enterprise AL
Smith II, Stanley McCreary	mac.smith@cricpa.com	Atlanta GA
Smith, Jeannette	jpsmith@cricpa.com	McAllen TX
Snelson, Jon Wayne	wsnelson@cricpa.com	Houston TX
Sparkman, Brent D.	bsparkman@cricpa.com	Tallahassee FL
Stafford, Ashley H.	astafford@cricpa.com	Enterprise AL
Standley, Joseph S	joseph.standley@cricpa.com	Albuquerque NM-2
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Sullivan-Davis, Jeanette	jsbonthuis@cricpa.com	Goldsboro NC
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Tomes, Edmon Jacob	jtomes@levelfourgroup.com	Level Four - Plano TX
Tomichek JR., Richard	rtomichek@cricpa.com	Nashville TN
Trahan, Josh	jtrahan@cricpa.com	Shreveport LA
Travani, Misty G	mtravani@cricpa.com	Jupiter FL
Trumbo, Steven E	strumbo@cricpa.com	Atlanta GA - Premier Plaza
Warren, Kimberly D	kwarren@cricpa.com	Roswell NM
Weaver, Pattie S	pweaver@cricpa.com	Atlanta GA
Webb, Larry D.	ldwebb@cricpa.com	Wilson NC
West, Shannon N.	swest@cricpa.com	Russellville KY
Wheeler, Steven A.	swheeler@levelfourfinancial.com	Bowling Green KY
White Jr., Mills Landon	lwhite@cricpa.com	Bowling Green KY
White, Michael J	mjwhite@cricpa.com	El Paso TX

ATTACHMENT B – SIGNING AUTHORITY



Payroll Name	Work Email	Physical Location
Wilcox III, Richard W.	rwilcox@cricpa.com	Atlanta GA
Williams, David A	david.williams@cricpa.com	Jackson MS
Williams, Steven G.	swilliams@cricpa.com	Montgomery AL
Wood, Danncey	dwood@cricpa.com	Corp-Enterprise AL
Woodall, Jimmy W.	jwoodall@cricpa.com	Bowling Green KY
Wright, James D.	jwright@cricpa.com	Niceville FL
Youngblood, Nancy C.	nyoungblood@cricpa.com	Shreveport LA
Zasada, Matthew J	mzasada@cricpa.com	Mary Esther FL
Zuniga, Kathleen Grayer	kzuniga@cricpa.com	New Orleans LA

ATTACHMENT C – OTHER DOCUMENTS



Anti-Lobbying Form

CERTIFICATION OF RESTRICTIONS ON LOBBYING

I, Becky Hammond, Partner, hereby certify on
(name and title of bidder's official)

behalf of Carr, Riggs & Ingram, LLC that:
(name of bidder)

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

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

Executed this 14th day of October, 2022.

By 
(signature of authorized official)

Partner
(title of authorized official)

ATTACHMENT C – OTHER DOCUMENTS



Debarment/Suspension Form
Debarment/Suspension Form

DEBARMENT/SUSPENSION CERTIFICATION

Debarment:

Federal Executive Order (E.O.) 12549 "Debarment" requires that all contractors receiving individual awards, using federal funds, and all subrecipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government. By signing this document you certify that your organization and its principals are not debarred. Failure to comply or attempts to edit this language may disqualify your bid. Information on debarment is available at the following websites: www.sam.gov and <https://acquisition.gov/far/index.html> see section 52.209-6.

Your signature certifies that neither you nor your principal is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Becky Hammond, Partner

(Name and Title of bidder's official)

Carr, Riggs & Ingram, LLC

(Name of bidder/company)

111 Veterans Blvd.

(Address)

Metairie, LA 70005

(Address)

PHONE 504-837-9116 FAX _____

EMAIL bhammond@cricpa.com

Becky Hammond _____ Signature October 14, 2022 Date

ATTACHMENT C – OTHER DOCUMENTS



Request for Proposals #0447

Grant Consulting Services in Connection with the American Rescue Plan Act of 2021 and Other Local, State, Federal and Private Opportunities

SIGNATURE PAGE

The Jefferson Parish Department of Purchasing is soliciting Request for Proposals (RFP'S) from qualified proposers who are interested in providing Grant Consulting Services in Connection with the American Rescue Plan Act of 2021 and other Local, State, Federal and Private Opportunities for the Jefferson Parish Public Safety Grants and Administration Department.

Request for Proposals will be received until 3:30 p.m. Local Time on: October 14, 2022.

Acknowledge Receipt of Addenda: Number: #1
Number: #2
Number: _____
Number: _____
Number: _____
Number: _____

Name of Proposer: Carr, Riggs & Ingram, LLC


Address: 111 Veterans Blvd.

Metairie, LA 70005

Phone Number: 504-837-9116 Fax Number _____

Type Name of Person Authorized to Sign: Becky Hammond

Title of Person Authorized to Sign: Partner

Signature of Person Authorized to Sign: 

Email Address of Person Authorized to Sign: bhammond@cricpa.com

Date: October 14, 2022

This RFP signature page must be signed by an authorized Representative of the Company/Firm for proposal to be valid. Signing indicates you have read and comply with the Instructions and Conditions.

ATTACHMENT C – OTHER DOCUMENTS



Request for Proposal

AFFIDAVIT

STATE OF LOUISIANA

PARISH/COUNTY OF JEFFERSON

BEFORE ME, the undersigned authority, personally came and appeared: Rebecca Hammond, (Affiant) who after being by me duly sworn, deposed and said that he/she is a fully authorized Partner of Carr, Riggs & Ingram, LLC (Entity), the party who submitted a proposal in response to RFP Number 0447, to the Parish of Jefferson.

Affiant further said:

Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit or the current term of the elected official, whichever is greater. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

Choice B X there are **NO** campaign contributions made which would require disclosure under Choice A of this section.

ATTACHMENT C – OTHER DOCUMENTS



Affiant further said:

Debt Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

Choice B X There are **NO** debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by **telephone or by personal contact**, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, to the extent known to the Affiant, the date of any such solicitation is included on the attached list.

Choice B X there are **NO** solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

ATTACHMENT C – OTHER DOCUMENTS



That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.

Affiant further said:

Subcontractor Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned RFP.

Choice B X There are NO subcontractors which would require disclosure under Choice A of this section.


Signature of Affiant

Rebecca Hammond
Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME

ON THE 13th DAY OF October, 20 22


Notary Public

Mark Alexander Embree
Printed Name of Notary

170937

Notary/Bar Roll Number

My commission expires At death

