

REQUEST FOR PROPOSAL  
To Provide Consulting Services for Disaster  
Recovery and FEMA Public Assistance  
RFP 0448

JEFFERSON PARISH  
OCTOBER 14, 2022

---

submitted by:  
TEAM TITLE, LLC d/b/a TEAM CIVIC SOLUTIONS  
69090 Hwy. 190 E. Service Rd., Suite 200  
Covington, LA 70433  
teamcivicsolutions.com | 985.327.7227



## SECTION A: COVER LETTER



Jefferson Parish  
Department of Purchasing  
200 Derbigny Street, Suite 4400  
Gretna, LA 70053  
VIA: Central Bidding Upload

Re: RFP To Provide Consulting Services for Disaster Recovery and FEMA Public Assistance  
Date: October 14, 2022

Dear Department of Purchasing:

Jefferson Parish has an ongoing need for responding to emergencies or disasters that could cause emergency conditions in Jefferson Parish. We understand that these emergencies can vary in scope and intensity, from a small local incidents with minimal damage to a multi-parish or state-wide disaster with extensive devastation and loss of life. Jefferson Parish utilizes FEMA's Public Assistance (PA) Grant Program to quickly respond to and recover from major disasters or emergencies. Services requested in this RFP cover documentation and FEMA guideline adherence to maximize grant funding for the successful recovery of Jefferson Parish.

The TCS Team submits this proposal as a collective of qualified firms with over 15 years in FEMA experience in reimbursement processes and procedures related to federally declared disaster events. TCS, with its subconsultants PLEXOS and PWR, LLC holds extensive knowledge in such federal and state requirements for FEMA reimbursement and the development of closeout documentation. All team members are experienced and available to consult with Jefferson Parish officials, prepare documentation and applications as required, and provide broad-based support services designated to help maximize federal funding, expedite the process and retain funds during the closeout process.

### **Our Goal**

Our team's goal in is to provide comprehensive recovery services that secure the greatest benefit to Jefferson Parish. We will accomplish this by:

- Engaging experts in federal program eligibility including, but not limited to 2 CFR 200 et seq. and the FEMA Public Assistance Program and Policy Guidance (PAPPG).
- Providing staff with extensive experience in assessing damages
- Integrating and supporting early in the process to document and specifically account for efforts
- Viewing and documenting all damages with the strategic vision of all potential funding streams

### **Our Strategy and Approach are Well-Tested**

- Engage our Specialized Team and key staff to work with Parish representatives to assess the program needs and build the necessary team. We get the right team in place without added expense to our clients.
- Work with Jefferson Parish to develop a full operational picture of all previous and ongoing efforts supporting your recovery for each disaster event and develop an integration plan most suited to your needs.
- Engage our accounting and documentation team to assure systems are set for success from the beginning. This includes providing systems specifically designed to support these programs. The TCS software solution is a collaborative workflow platform designed to ensure compliance, accountability, and reporting.
- Scale the team based on Jefferson Parish's needs throughout program delivery and strive to complete the mission. We don't fail, and we get the job done.

*continued next page*



We understand and agree to comply with all provisions, regulations and guidelines of federal programs. We are confident that the team at TCS has the experience, capacity, and skills necessary to deliver the services requested. Because of our extensive experience in state and federal programs, we understand the needs of Jefferson Parish. Financial resources are currently in place, and the team has the ability to deliver the project within the time specified. Based on our past experience over 13 years with repeat clients (municipal and state) and our solid work history, TCS has a reputation for solid character, integrity, judgment and experience with federally funded programs. We have the organizational capacity to administer the services for the required term. Our references can attest to our high quality delivery of prior program management assignments and federally-funded program administration.

On behalf of TCS, thank you for your consideration of the attached proposal. We acknowledge our acceptance of the scope of services and our intent to enter into a contract with Jefferson Parish. If awarded the contract, we will comply with the contract terms and conditions defined in the RFP. Should there be any questions or a need for additional information, please do not hesitate to let me know.

With Kind Regards

A handwritten signature in blue ink, appearing to be "K Pond", with a long horizontal flourish extending to the right.

Kevin Pond  
Chief Commercial Officer, TCS (Federal Tax ID 75-3159885)  
Authorized Representative/Binding Authority/ Contract & Technical Clarifications  
69090 Highway 190 E. Service Road, Suite 200  
Covington, LA 70433  
Phone: 985.327.7227 | Email: [kpond@teamcivicsolutions.com](mailto:kpond@teamcivicsolutions.com)

# CERTIFICATE OF AUTHORITY

## CERTIFICATE OF AUTHORITY FOR TEAM TITLE, L.L.C. d/b/a TEAM CIVIC SOLUTIONS

The undersigned, being the managing member of TEAM TITLE, L.L.C. d/b/a TEAM CIVIC SOLUTIONS (the “*Company*”) and acting in such capacity, hereby certify that:

Kevin Ponds (“*Agent*”) is hereby appointed as agent of the Company and is hereby authorized, empowered and directed to act on behalf of the Company do and perform any and every act, matter and thing whatsoever, as Agent may deem necessary or appropriate in connection with the submittal of a response to that certain Request for Proposal issued by Jefferson Parish on September 14, 2022 for Consulting Services for Disaster Recovery and Fema Public Assistance, including without limitation, to do and sign all acts necessary to effectuate such submission.

THUS DONE AND SIGNED this 13\_\_ day of October, 2022.

MEMBERS:



Thomas E. Richards, Manager and Member

## CERTIFICATION

The undersigned, Thomas E. Richards, as Manager and Member of TEAM TITLE, L.L.C. d/b/a TEAM CIVIC SOLUTIONS, a limited liability company organized and existing under the laws of the State of Louisiana (the “*Company*”), do hereby certify that the above-named persons are all of the members of the Company, that the foregoing Certificate of Authority has been duly adopted and approved by all the members of the Company; and the same are in conformity with the organizational documents of the Company and have not been modified or rescinded.

This this 13 day of October, 2022.



Thomas E. Richards, Member



# SECTION B: TABLE OF CONTENTS

<b>SECTION A</b>	<b>COVER LETTER</b>
<b>SECTION B</b>	<b>TABLE OF CONTENTS</b>
<b>SECTION C</b>	<b>TECHNICAL PROPOSAL: PART II COMPLIANCE</b>
<b>SECTION D</b>	<b>PROPOSER QUALIFICATIONS AND EXPERIENCE</b> YEARS OF EXPERIENCE OBLIGATED FUNDING TO DATE RECEIPT OF REIMBURSED FUNDING TO DATE TEAM RESUMES PROJECT EXPERIENCE REFERENCES PERFORMANCE STANDARDS (RFP pg 25)
<b>SECTION E</b>	<b>INNOVATIVE CONCEPTS</b>
<b>SECTION F</b>	<b>PROJECT SCHEDULE</b>
<b>SECTION G</b>	<b>FINANCIAL PROFILE</b>
<b>SECTION H</b>	<b>PRICE PROPOSAL: ATTACHMENT B [SEPARATE FILE]</b>
<b>SECTION I</b>	<b>ADDITIONAL INFORMATION &amp; ATTACHMENTS</b> INSURANCE INDEMNIFICATION STATEMENT EEOC & ADA COMPLIANCE AUDIT OF RECORDS RECORD RETENTION & RECORD OWNERSHIP ANTI-LOBBYING FORM AFFIDAVITS



## SECTION C: TECHNICAL PROPOSAL

# TECHNICAL PROPOSAL

Provide assistance to the Public Safety Grants and Administration Department in procuring FEMA Public Assistance, based on federal and state requirements. Proposer must provide the broad-based support services designated to help maximize federal funding, expedite the process and retain funds during the closeout process.

Our philosophy is that planning for recovery should begin before a disaster occurs in order to properly prepare for issues such as procurement, environmental concerns, and labor requirements.

## Technical Assistance

Plexos has a comprehensive understanding of the federal programs, funding streams and guidelines to include FEMA Public Assistance (PA), Hazard Mitigation Grant Program (HMGP), Individual Assistance (IA), as well as Community Development Block Grant (CDBG) programs, U.S. Army Corps of Engineers (USACE) programs, Federal Highway Administrative (FHWA) funding, Environmental Protection Agency (EPA) funding and various private funding sources. The Plexos team is experienced in managing and monitoring large-scale disaster recovery programs and has developed, delivered, maintained, and completed key pre- and post-disaster recovery, grants management, and administration support activities for the FEMA Public Assistance (PA) Program.

Plexos has the systems, tools, and expertise in place to successfully implement multi-billion-dollar FEMA PA and HMGP programs. Our FEMA PA and HMGP experts have concurrently managed and monitored more than \$31 billion in federal disaster recovery initiatives funded as a result of Hurricanes Katrina, Rita, Gustav, Ike, Isaac, and Sandy. Key staff have managed \$5.2 billion in Texas for FEMA PA and 406 Hazard Mitigation for more than 13 disasters managed more than \$750 million in HGMP funding for the single largest HMGP program in U.S. history.

## Implementation of Best Practices

We will work closely with the Parish to take advantage of all federal funding opportunities, to support an expedited and complete recovery, avoid duplication of benefits, and implement our best practices as shown in Table 1.

## Integrated Approach

At Plexos, we measure and control all critical aspects of the program's progress to monitor trends and react timely. Figures 1 and 2 illustrate our critical success factors and the programs where we have used them. Our goal is to provide a closed-loop process with both oversight and control to manage both technical and management aspects of the program. Our program management approach includes regular internal and external meetings/reviews, to assess overall progress, identify and manage risks, ensure close coordination and foster effective internal and external team communications.

Plexos develops and implements strategies designed to maximize federal and state assistance. We provide support for strategic planning and coordination of all disasterrelated efforts. These best practices are based on lessons learned from executing more than \$31 billion in FEMA and HUD funded response and recovery programs from 23 natural and man-made disasters.

## TABLE 1: BEST PRACTICES

- Utilization of “lessons learned” to preposition resources in order to support and accelerate immediate response efforts and ensure continuity of operations.
- Deployment of proven methods to fast track the FEMA PA process and maximize the amount of reimbursement funding available to the Parish.
- Streamlined processes to shorten recovery timeframes once response activities are fully staffed and underway.
- Capture of all necessary FEMA data points to accurately report damages and assess unmet needs to obtain approval of programs and projects that will comprehensively address the recovery needs of Jefferson Parish
- Development of effective funding strategies in order to leverage available federal funds.
- Identification of opportunities to maximize mitigation assistance to eliminate risk from future events.
- Deployment of risk management strategies and Quality Assurance and Quality Control (QA/QC) processes to improve program operations, documentation, and eliminate errors.
- Effective document management protocols to capture and retain all source documentation necessary to achieve full reimbursement and funding of damages and recovery projects.
- Pro-active monitoring programs and vendor monitoring plans to minimize risk and noncompliance.

Our plan is designed to provide high quality, continuous management and improved customer visibility into program technical, costs, schedules, and risk performance.

Figure 1. The Plexos team’s approach to success includes these critical factors.



### APPLY A GLOBAL APPROACH TO RECOVERY DESIGN

- Integrate subgrantees in the recovery design and planning process
- Rapidly identify damages and develop a recovery strategy to accurately tract Direct Administrative Costs (DAC)
- Follow proper procurement procedures if contractors are used
- Understand implications of the Sandy Recovery Improvement Act (SRIA)



### DESIGN DATA CAPTURE FOR LEVERAGE BY ALL PROJECTS

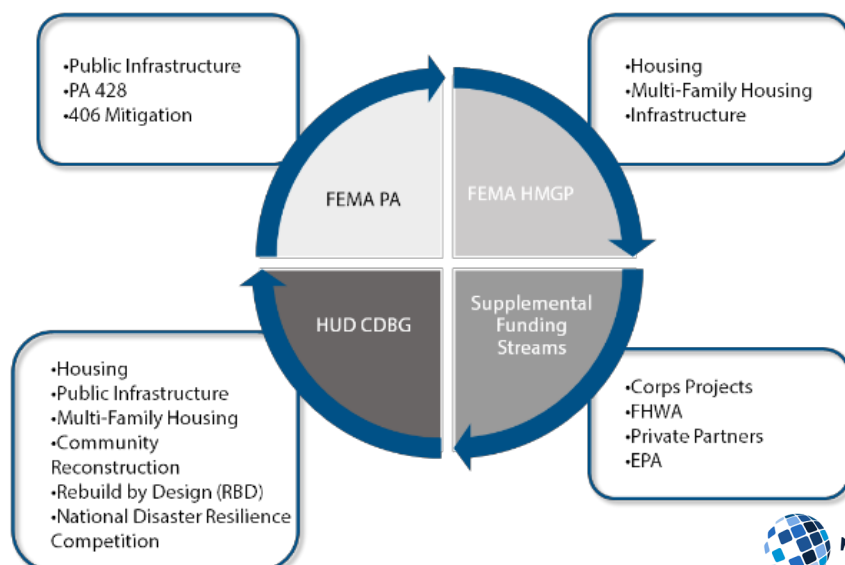
- Establish document retention and financial procedures
- Prepare detailed scopes of work and cost estimates
- Track all amendments and costs on a project-by-project basis



### GLOBALLY MATCH PROJECTS AT THE HIGHEST LEVEL

- Explore all potential funding sources
- Sequence projects to leverage funding

Figure 2. We apply our approach to success on all FEMA and HUD programs.





## Program Management

Our approach to program management is reflected in Figure 3 and detailed below. Our team will assist Jefferson Parish develop a Management Approach (Plan)

- Assist in the development of the Jefferson Parish Disaster Recovery Team
- Determine roles and responsibilities
  - o Emergency Planning
  - o Disaster Recovery Mitigation planning
- Facilitate communications and coordination

Determine losses

- Debris operations and emergency response
- Evaluate construction contracts, construction cost estimates, codes and standards
- Building/Equipment/Supplies
- Roads/Utilities/Recreation
- Immediate needs funding
- Temporary relocation costs

Categorize losses and prioritize funding source potential

- Insurance extra expenses and property
- FEMA categories A-G
- Responsibilities of other federal agencies
- Special considerations (Historical, Environmental, and Floodplain)



Figure 3. The Plexos team will assist the City of DeRidder in a successful program management approach.

Determine project eligibility and allowable costs determinations

- Fully describe and document loss elements
- Provide verification and reporting
- Research and maintain appropriate documentation of activities

Develop and maintain a comprehensive recovery strategy

- Assist with design and scope development
- Discuss mitigation options and formulate the approach
  - o 406 mitigation funding options
- Prepare project worksheets and damage inspection reports
- Documentation preparation and review
  - o HMGP applications
  - o LMS strategy
  - o Emergency Management Plans

Develop a funding approach

- Identify and document any changes
- Document unaccounted damages, change orders or other issues which require versioning of the project worksheet

Develop an Implementation Plan

- Develop applicable project worksheets and proposals
- Complete approved projects
- Make routine site visits to evaluate progress, performance and compliance
- Provide verification and reporting, as well as, appropriate documentation of activities
- Attend progress meetings
- Prepare and maintain detailed project files, reviewing all addenda for eligibility and compliance

Provide Final Inspection and Closeout

- Assist the County with change order processing and reviews
- Manage and oversee any required owner-furnished testing and inspection services
- Maintain schedules of documentation deadlines and construction milestones
- Provide ongoing monitoring and status reporting to Jefferson Parish

## **Training**

Our combined team has delivered numerous trainings around the country and can customize any training to meet the needs of Jefferson Parish. To ensure that the Jefferson Parish's staff has a full understanding of what is expected under federal funding initiatives and to help facilitate smoother communication and coordination among departments, we provide disaster recovery training annually and immediately following the disaster. This training includes post-Sandy policy changes and is regularly updated to reflect current best practices.

## **Cost Reconciliation**

Reconciling costs is a central component of project tracking and project closeout and audit. As projects are versioned and drawdowns are requested from the State, we will work with the Parish to collect the necessary documentation to support proper reconciliation. This includes work complete vs. work to be completed as projects progress and actual costs incurred vs. estimated costs are outlined in the project worksheet. This process is facilitated by our thorough approach to project worksheet development and tracking, which is prepared for closeout and audit from the onset of the project.

## **Team Objectives**

We accelerate reimbursement for damages incurred and expedite funding for projects that will enable full recovery from a disaster. In addition, our goal is to provide optimal customer service and ensure that all activities are adequately documented and conducted in compliance with federal regulations. Specific objectives of the team are to:

- Deliver FEMA Public Assistance program management that maximizes reimbursement.
- Assist in conducting thorough damage assessments in order to establish accurate project budgets and complete projects within funding allocations.
- Identify and capitalize on opportunities for FEMA 404 and 406 assistance to reduce or eliminate risk from future events.
- Provide financial and grants management support based upon “best practices” and “lessons learned” from previous disasters.
- Design and develop effective and auditable data and document management mechanisms that result in real-time tracking and management of the response and recovery initiatives.
- Provide engineering and design services in order to thoroughly evaluate damages, develop bid specifications, and monitor construction.

## **Financial and Grant Management Support**

The TCS and Plexos team’s knowledge and expertise of concurrently managing a large portfolio of federally funded programs and budgets allow us to provide financial and grants management support to include:

### **Financial Management**

- Establishing key internal controls to ensure that all FEMA funds are managed and monitored in accordance with federal regulations in order to ensure reimbursement and funding of eligible activities, reasonable project delivery costs, and incurred expenses.
- Developing project plans, projected timelines, and deadlines for all projects to track expenditure rates and managing the drawdown of FEMA funding.
- Aligning program timelines and expenditure rates with grant agreements to ensure compliance with congressional allocations and Federal Register Notices.
- Creating accurate program budgets to project administrative costs, project delivery costs, and program management.
- Creating and generating accurate reports that depict the budget, program progress, and expenditure rates.
- Categorizing, recording, tracking, and filing all costs to support reimbursement and drawdown of federal funds, which includes the tracking of Project Worksheet progress and payment from the state and FEMA.
- Supplemental support for audit and monitoring activities and responses.
- Compiling, summarizing, and justifying costs for presentation such as FEMA Project Worksheets (PWs) to Federal agencies for reimbursement of eligible costs, ensuring compliance with applicable regulations.

### **Grant Management**

- Developing a document management plan that specifically outlines the structure, containment, and management of all project documentation consistently for all government departments. The plan maintains efficient and complete records concerning all applicable grant programs.
- Attending meetings with City, State, and Federal agencies to assist with the negotiation and presentation of government required documentation used to obligate eligible amounts.
- Providing advice to maximize reimbursements of disaster recovery expenses.
- Providing advice to government personnel and consultants, as well as attending and participating in meetings as required.

- Preparing draft correspondence to local, Federal, and State officials as necessary.
- Preparing and conducting the close-out process, ensuring maximum recovery and retention of all eligible funding, satisfactory disposition of appeals and availability of supporting documents for future audits.
- Keeping track of, and monitoring, our own time and activities by project, or as allowable under the provisions of Federal guidance for direct administrative, indirect, and project management costs (reference Federal regulations and policy guidance for these topics).
- Providing written performance and status reports to client on the status of the FEMA Public Assistance, FEMA HMGP, HUD CDBG, and other grant programs as requested.

## **Regulatory Compliance**

### **Federal Regulations**

- Public Law 93-288, as amended (Stafford Act)
- Disaster Mitigation Act of 2000
- FEMA Regulations, 44 CFR Parts 206 & 207
- Executive Order 11988, Floodplain Management
- Executive Order 11990, Protection of Wetlands
- Executive Order 12372, Intergovernmental Review of Programs and Activities
- Executive Order 12549, Debarment and Suspension
- Executive Order 12612, Federalism
- Executive Order 12699, Seismic Design
- Executive Order 12898, Environmental Justice
- Single Audit Act, Public Law 98-502
- 2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards
- 44 CFR, Emergency Management and Assistance
- Sandy Recovery Improvement Act publications
- 16 U.S.C. § 470, National Historic Preservation Act
- 16 U.S.C. § 1531, Endangered Species Act References
- FEMA program publications, guidance and policies
- FEMA-State Agreements

The TCS/Plexos team assures Jefferson Parish that we shall comply with all applicable federal regulations and state statutes in effect with respect to the periods for which it receives federal disaster grant funding. Our team acknowledges that funding under the FEMA PA Program are conditional upon compliance with all terms and conditions of the FEMA-State Agreement and all applicable federal laws, rules and regulations. Upon notice to proceed from the Parish, the team will assist in managing and administering the Public Assistance Program per 44 and 2 Code of Federal Regulations.

These responsibilities include:

1. Submitting the request for public assistance.
2. Complying with federal and state program and grant administrative requirements.
3. Conducting and participating with GOHSEP /FEMA in conducting damage surveys to serve as a basis for obligations of funds.
4. Conduct briefings to Parish leadership.
5. Participating in the applicant briefing and kick-off meetings.
6. Assigning staff to work with FEMA/State Public Assistance personnel in the development of the project worksheets and special considerations.
7. Assisting FEMA/State personnel in determining work and eligibility.
8. If directed by Parish leadership, request Immediate Needs Funding.



9. In conjunction with the Parish, identify areas for 404/406 hazard mitigation.
10. Processing requests for appeals, time extensions, improved projects, advances and reimbursements.
11. Forwarding requests, with the State's recommendation, to FEMA on alternate project requests and improved project requests (if required).
12. Complying with administrative requirements of 2 CFR Subpart B – General Provisions, Subpart C – Pre-Federal Award Requirements, Subpart D – Post Federal Award Requirements and Subpart F – Audit Requirements.
13. Securing insurance information from the Parish as required by Stafford Act and 2 CFR 200.310 Insurance Coverage
14. Reviewing and submitting project completion information.
15. Conducting quarterly reviews, site inspections and grant compliance reviews, as required, ensuring program compliance.
16. Determining budget and staffing requirements necessary for proper program management.

**Our team experts provide programmatic and policy advice with federal regulations, specifically including the Robert T. Stafford Disaster Relief and Emergency Assistance Act, Post-Katrina Emergency Management Reform Act of 2006, and the Sandy Recovery Improvement Act of 2013.**

### **Federal Disaster Relief Programs**

The TCS/Plexos team has extensive disaster recovery knowledge and understanding. The FEMA PA grant program and mitigation services will require extensive understanding of the Stafford Act, 44 CFR, federal acquisition regulations, FEMA guidelines, OMB Circulars (2 CFR), and a myriad of other emergency management laws, as well as practical experience in related disaster programs administered by FEMA. It will require intimate knowledge of local disaster recovery activities unique to the State of Louisiana, requirements imposed by FEMA, and federal laws and regulations governing the receipt and disbursement of disaster funds. In addition, the project will require extensive knowledge in the following areas, where our team can assist: Our team will bring the following knowledge and expertise to Jefferson Parish:

- Stafford Act
- Disaster programs administered by FEMA, public assistance, debris removal, individual assistance, hazard mitigation, CDBG/HUD and NFIP
- 2 CFR 200
- Sandy Recovery Improvement Act pilot program to include, alternate procedures for debris and permanent work
- Grant management, financial management and internal controls
- Federal and state cash management
- FEMA and HUD policies and practices and guidelines
- Environmental and historical preservation guidance
- Engineering technical assistance
- Insurance claims recovery
- Federal acquisition regulations
- Information technology and Database solutions
- Cost Estimating Format and RS Means

The TCS/Plexos team offers in-depth expertise in the post-disaster field as it relates to DHS-FEMA support. Our in-house resources include technical specialists with advanced knowledge of FEMA Public Assistance gained through years of working post-disaster in numerous communities:

- On the Gulf Coast supporting the recovery of Hurricanes Katrina, Rita, Gustav, and Ike
- In the Northeast supporting the recovery of Superstorm Sandy;
- In South Carolina supporting the recovery of the severe flooding in 2015
- In Missouri supporting the recovery from the Mississippi River flooding
- In Florida supporting the recovery of Hurricanes Irma and Michael
- In North Carolina supporting the recovery of Hurricane Florence
- In Louisiana supporting the recovery from the Great Flood of 2016
- In Texas supporting the recovery of Hurricane Harvey
- In Louisiana and Florida supporting the recovery of COVID-19
- In the U.S. Virgin Islands supporting the recovery of Hurricanes Irma and Maria.

We will support the Parish with the following post-disaster consulting and grants management and administration support functions:

- Document Management – process development and delivery
- Project Worksheet Lifecycle Support – development, approval/funding, delivery and close-out
- Hazard Mitigation Grant Program Applications – preparation, submittal and tracking
- Project Eligibility Issue Management – review, appeals and resolution
- Damage Assessment and Technical Assistance – as needed support
- Procurement Process Support – process delivery and management
- General Services Support
- Correspondence
- Disaster Recovery Financial Process (including policy changes and requirements)
- Audit Support
- Tracking and Reporting of Resources by Project
- Insurance Support
- Construction Management, Engineering and Inspections

### **Procurement**

Our team has demonstrated abilities to develop and execute processes for evaluating projects on procurement compliance. We will evaluate projects for compliance with all applicable laws and regulations. We will bring our compliance experience for highly complex procurement rules for receiving federal funding to this project. We strive to strike a balance between our clients' needs and the compliance needs of the regulatory community at all levels. In addition to reviewing procurement compliance, our teams have successfully written purchasing proposals for numerous clients ranging from design/build construction projects to equipment purchasing.

### **Attend Meetings**

Our team is comprised of leading emergency recovery experts in the country and are fully committed to the response and recovery efforts of Jefferson Parish. As a result, our ability to devote time and resources is unmatched. Our key staff have attended, and presented, at meetings on behalf of our clients for officials at all levels of government. With our team of experts, we know the importance of transparency to the community, city and parish officials, state and federal partners. We provide extensive work plans that contain our expected level of effort, task schedule, deliverables, meetings, and your conditions of satisfaction. We acknowledge that these plans will change drastically over the first 6 months, but our level of commitment will remain steadfast and focused on the recovery priorities tasks.

## Project Worksheet Formulation

The TCS/Plexos team includes professional experts who prepare damage assessments, perform technical reviews and provide oversight in the furtherance of program objectives. This includes cost reconciliation support, destructive and non-destructive testing to document damages such as roof system analysis, wall system testing, metallurgy, hazardous materials testing, geotechnical investigations, topographic surveys, and other related information necessary to document storm-related damage.

We have taken the low-tech process of collecting damages to the next level. We utilize cutting edge damage assessment software specifically designed to capture all the required information needed to populate the project worksheet. Our information is safely stored on internal servers and readily available to populate the project file. In addition to accurately capturing the damage, we use the assessments to establish accurate project budgets and complete projects within funding allocations.

## Opportunities to Maximize Funding





The TCS/Plexos team provides assistance and support for grants management and administration as needed for federal, state and parish programs, including primarily, but not limited to, the Federal Emergency Management Agency (FEMA) Public Assistance Program, FEMA Hazard Mitigation Grant Program (HMGP), HUD Community Development Block Grant (CDBG) Disaster Recovery Program, HUD CDBG Mitigation Program, and the U.S. Department of Transportation Program. We work closely and collaborate with various funding agencies and internal governmental departments to ensure the proper use and application of federal and state funds while maximizing eligible, allocable federal dollars. We also employ process optimization measures to reduce the timeline for eligibility determinations that support project cash flow sources and uses.

## Hazard Mitigation

Hazard Mitigation funding is one of the most overlooked and underutilized aspects of the PA program. The TCS/Plexos team focuses on actively identifying and educating clients regarding hazard mitigation opportunities. We will work with Jefferson Parish to take advantage of this additional funding to strengthen and improve infrastructure, seizing every opportunity to protect against future damage. This includes actively seeking out opportunities to build Section 406 Hazard Mitigation projects into project worksheets, as well as opportunities for 404 Hazard Mitigation Grant Program funding through the State.

Our experienced team is trained to recognize and suggest hazard mitigation opportunities at all stages of the project. Regardless of 406 funding or HMA, our team of planners, hazard mitigation specialists, and program managers will work with the Parish to achieve funding needed to implement priority projects to reduce or eliminate future threats to the community.

Jefferson Parish may be given the opportunity to rebuild facilities and incorporate resiliency measures. Maximizing the amount of HMGP funding the Parish receives is a top priority for the Plexos Team. Our professionals have had success working with FEMA on broad cost-effective

Stafford Act Section <b>406</b>	Stafford Act Section <b>404</b>	National Flood Insurance Act of 1968 <b>NFIA</b>	Stafford Act Section <b>203</b>
PA Programs	HMA Programs		
<b>Disaster-related programs</b>  <b>PA:</b> Mitigation of incident-caused damage  Funding: Available for disaster-damaged facilities only*	<b>Disaster-related programs</b>  <b>HMGP:</b> Multi-hazard, statewide mitigation  Funding: Available for damaged and non-damaged facilities based on a percentage of dollars obligated to the PA and IA programs	<b>Non-disaster-related programs</b>  <b>FMA:</b> Flood mitigation for insured properties  <b>PDM:</b> Multi-hazard, project-specific	
NOTE: PA = Public Assistance HMA = Hazard Mitigation Assistance HMGP = Hazard Mitigation Grant Program		FMA = Flood Mitigation Assistance PDM = Pre-Disaster Mitigation IA = Individual Assistance	

mitigation measures, resulting in HMGP funds that maximize 100% of the repair cost offered through the PA program. We will achieve these results for the Parish by making mitigation central to project development, accomplished by embedding hazard mitigation specialists to review PWs and ensure all possible opportunities to incorporate mitigation are maximized.

The TCS/Plexos team will work in conjunction with FEMA to meet one or both criteria for eligibility requirements of 406 Mitigation. If the eligible facility fails to meet one or both criteria, we will work closely with FEMA to formulate a Benefit Cost Analysis (BCA) to determine cost effectiveness. The TCS/ Plexos team has extensive experience with restoration/repair activities related to permanent work and has successfully received eligible work under the following categories under the PA Program.

- Category C - Roads and Bridges
- Category D - Water Control Facilities
- Category E - Buildings and Equipment
- Category F - Utilities
- Category G - Parks, Recreational, and other (improved beach)

Successful projects have been performed in several states and across three FEMA Regions— Texas, Louisiana, New York, Missouri, Florida, North Carolina and South Carolina.

The team has developed Stafford Act 404 Hazard Mitigation grant application and plans since the implementation of the Disaster Mitigation Act in 2000. This includes developing each section of Hazard Mitigation Grant Program (HMGP), Pre-Disaster Mitigation (PDM), and Flood Mitigation Assistance (FMA) non-structural and structural projects such as acquisitions, home elevations, and community safe rooms.

We have experience in both drafting and reviewing HMGP projects for states and communities in response to Hurricanes Katrina, Rita, Ike, Gustav, Sandy, Irma and Michael. We have assisted clients with obtaining HMGP funding from application development through funding and project approval, including responding to Requests for Information (RFIs) from FEMA.

Specifically, our team will:

- Develop a detailed narrative statement and scope of work;
- Identifying hazards and historical occurrences;
- Complete a detailed budget;
- Detail the proposed work schedule;
- Complete State and Federal assurance forms;
- Conduct correspondence with TDEM and FEMA; and
- Revise the application if requested by TDEM or FEMA.

Based on previous work with GOHSEP and FEMA Region IV for state and national projects, we have insight into the most recent changes for HMGP applications. Due to our rapport and experience with GOHSEP and FEMA, our application submissions will expedite any requests for revisions to HMGP applications on behalf of Jefferson Parish.

### **Agency Coordination**

Our team works with agency departments to assist in the compilation of documentation for Project Worksheets and identify permit and regulatory requirements necessary to complete Project Worksheets. We will provide assistance to Jefferson Parish as needed, including:



- Preparing and coordinating the development of Project Worksheets, intake forms, supporting claim documents, and other documentation as required by the Parish and local, state, and federal agencies.
- Preparing, submitting, and tracking grant program applications (FEMA / GOHSEP) as required by local, state, and federal agencies. This includes project or program development, formulation, processing, and monitoring as required.
- Working with departments and divisions to obtain all costs and necessary backup documentation to develop, revise and submit PW's and grant applications to the federal agencies to be approved, obligated, and reimbursed.
- Reviewing eligibility issues and developing justifications for presentation to applicable federal agencies, state agencies, and other agencies involved in providing disaster recovery funds.
- Ensuring that all eligible damages have been identified, quantified, and presented to FEMA and GOHSEP. All eligible damages shall be incorporated into PW's and grant applications with supporting documentation and proper cost estimates, using the FEMA Cost Estimating Factor (CEF) when necessary.
- Reviewing contracts, bid documentation, change orders, and other records to support the proper preparation and presentation of PW's, grant applications, and eligible activities.

The TCS/Plexos team has technical specialists with the professional backgrounds and experience to offer the Parish a comprehensive solution to financial and grant management challenges in all phases of the short and long-term recovery process. We have the ability to produce web-based reports to provide immediate insight into all program performance metrics. Our reports, customized by public assistance, mitigation and recovery categories, will provide the Parish direct access to project benchmarks, milestones, and barriers. Besides proactively developing a smart strategy and making key strategic decisions throughout the formulation of grants, establishing processes to ensure productivity, quality, and performance are essential to effective grant administration. Our team has a notable track record in grant administration due to our mission focus and talented professionals.

### **Project Worksheet Development**

Federal and state emergency management staff require information concerning the condition of existing infrastructure to determine if federal assistance will be available through a Presidential Disaster Declaration. Knowing the extent of damage and work to be completed will allow the development of a recovery plan. This information can be presented to FEMA as the basis for production of Project Worksheets (PWs), which capture the eligible work to be performed and are required for Public Assistance funding. We have the expertise to assist in evaluating the extent of damage, project costs eligible for federal funding reimbursement, and the development and formulation of FEMA PA Emergency and Permanent Work PWs. Our team will work in conjunction with the Parish on FEMA's rules, practices, procedures, how to track costs, and provide general grant management advice. The expertise we offer includes:

- Assistance with the assessment of damage to public infrastructure components, transportation systems, and facilities;
- Capture of eligible costs in Damage Assessments and Project Worksheets ensuring project costs are estimated accurately;
- Development and formulation of FEMA PA Emergency and Permanent Work Project Worksheets including cost estimating, developing Detailed Damage Descriptions and Dimensions ("DDD's") and a project's Scope of Work ("SOW");
- Preparation of cost reports, reconciliation of invoices and expenses, and review of Project Worksheets to determine final eligible costs, third party refunds, and reimbursement including the review of debris removal and monitoring contracts;
- Verification that procurement procedures comply with applicable regulations;

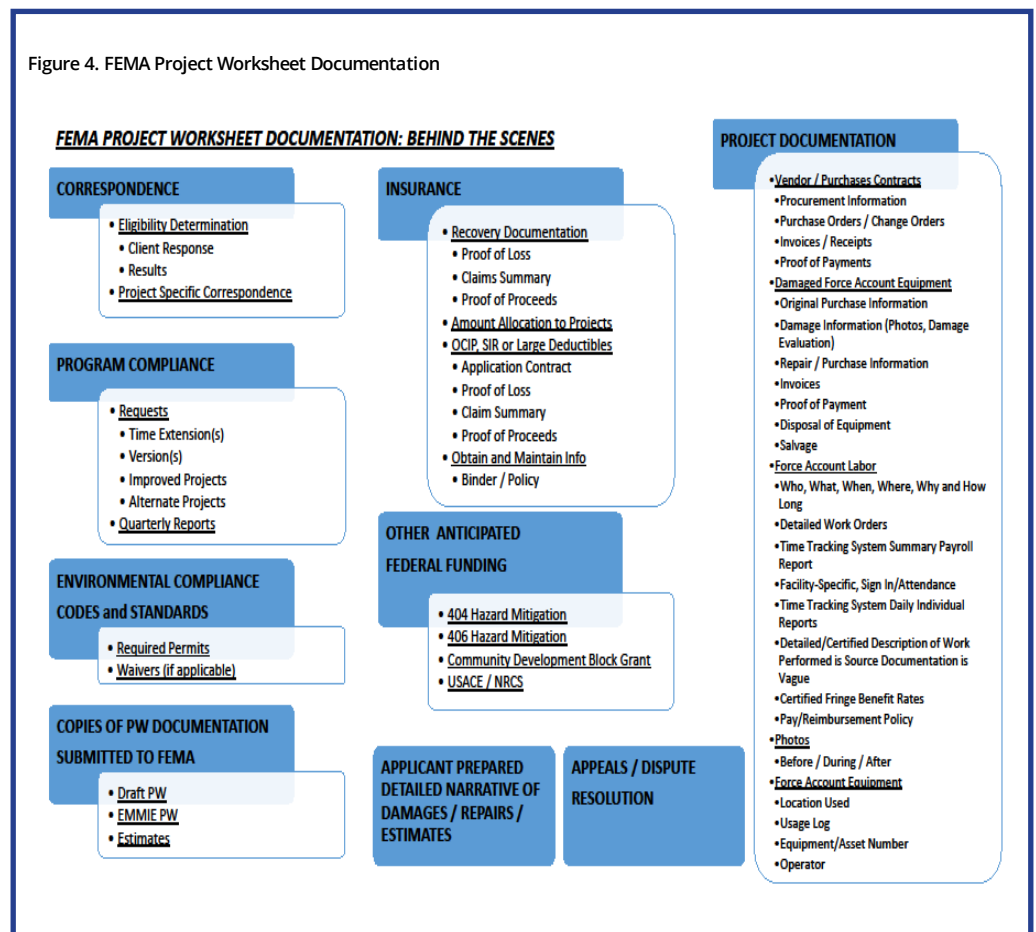
- Assistance in the development of hazard mitigation proposals (Section 406 of the Stafford Act);
- Evaluation of potential for alternate and improved projects;
- Review of PA projects for environmental and NFIP compliance;
- Provision of technical assistance, including engineering and architectural support;
- Streamlined communication with GOHSEP, FEMA, and other agencies. Attendance at meetings with the state and FEMA to address eligibility and process issues, at the request of the Parish;
- Ensuring that force account labor, equipment, and materials are recorded properly and are acceptable to FEMA
- Capture of all reimbursable Direct Administrative Costs (DAC);
- Identification and resolution of issues that may arise related to the funding of work completed or to be completed by the jurisdiction and file any necessary project amendments;
- Closeout of projects, including assistance with pre- and post-audit activities; and
- Preparation of first and second appeals, as requested.

FEMA and the state track projects based on an individual Project Worksheet. A building or a room may have multiple project worksheets. For each PW, we will obtain, analyze, and gather relevant data, communications, and supporting documentation, including timekeeping and staff assignment records to review for clarity, completeness, consistency, and accuracy.

The TCS/Plexos team will work with the Parish finance to establish a paper and electronic filing system based on Project Worksheets. Projects may be subject to audit by FEMA or GOHSEP before final closeout and payment. Thus, an efficient filing system can decrease a de-obligation of federal funding and increase closeout time and reimbursement of costs incurred.

Resources used or work performed by the Parish, such as force account labor, equipment, and material require specific documentation in order to be acceptable for FEMA reimbursement. We will work closely with Jefferson Parish to determine eligible project cost and the supporting documentation required by FEMA to receive full reimbursement.

Figure 4. FEMA Project Worksheet Documentation



### **Oversight of Contractor's Billing**

Our team will provide financial support services including oversight of contractors' billing to ensure that work is invoiced properly and contractors are only compensated for work actually performed; claiming and documenting all costs eligible for the disaster grant funding; categorizing, recording, tracking and filing costs in support of the financial reimbursement process; and tracking Project Worksheet and payment status from the state. Additionally, we will advise the Parish on all procurement policies and will work closely with staff to ensure policies are followed since proper procurement of contracts is required for funding eligibility.

### **Develop Scopes of Work**

As a reimbursement program, it is critically important that the scopes of work developed for PWs are accurate, clearly written, and complete. The team supports this by offering the Parish a multidisciplinary team that knows federal programs, appropriate construction methods, and local requirements which will enhance our ability to develop scopes of work and maximize funding available to support recovery.

### **Account for Special Considerations**

Special considerations, such as environmental and historic preservation reviews, must be kept in mind immediately after a disaster. The TCS/Plexos will support Jefferson Parish to begin permanent work, while incorporating National Historical Preservation Act and the National Environmental Protection Act considerations. Incorporating these regulatory requirements during project formulation will help our team ensure the Parish does not engage in work that is later deemed ineligible.

### **Cost Estimating**

The TCS/Plexos team continues to engage in PA contracting where we are known for our reliable estimating through a process-driven approach that follows industry standard protocols to develop estimates that are enough for the owner's purpose. The form and precision of these estimates are dependent on client preference, available design documentation, and cost databases. Our success in construction cost estimating is demonstrated by the accuracy of our construction estimates. Estimates that vary by more than 10% are often a function of one or more of the following factors:

- insufficient scope of work;
- owner-generated design changes and change orders;
- hidden conditions;
- unforeseen spikes in local pricing;
- material availability;
- unexpected changes in labor conditions.

We have the ability to assess these factors of design costs and identify indicators that may drive up construction costs prior to, and during, the development of estimates, incorporating allowances for unknowns, cost risk-based pricing, and trend/range estimating. This allows us to accurately estimate costs during the PA process.

### **Project Grouping**

Recent guidance promulgated by FEMA instructs project specialists to formulate projects by "logically grouping" work. In practice, this has resulted in large permanent work PWs, grouping facilities without taking into consideration how an applicant does business. We believe that fewer PWs are better and we will leverage this guidance to logically group the Parish's PWs based on the current systems and use of systems. We will work with the Parish to leverage internal subject matter expertise to determine when and how grouping should be applied, so funding, time, and resources are maximized while processes are streamlined.

## **Progress Payments**

Following grant application and project formation, the PA program becomes transactional, requiring funds to be drawn down as work progresses. We will work with the Parish to establish a streamlined payment process by developing mutually agreeable documentation requirements along with GOHSEP and FEMA that are concurrent with existing practices. This will ensure the payment process is efficient while limiting the burden on the current Parish finance team.

## **Reporting**

We provide project reports for local, state, and federal contracts in the form of weekly written reports, monthly reports, automated reports, and have performed quarterly reports on behalf of grantees and sub-grantees. We utilize an internal workflow tool to review and monitor the development of grants and the management and processing of projects to closeout, including the preparation of reports for the state and FEMA, as needed.

## **Duplication of Benefits**

Our team has developed methods and procedures to prevent the duplication of benefits as required by the Robert T. Stafford Disaster Relief and Emergency Assistance Act, the Disaster Relief Appropriations Act of 2013, and the Small Business Administration.

We understand the need for transparent program and project tracking and accurate recordkeeping to avoid duplication of benefits. Our grant-funded disaster recovery support has included managing projects funded by multiple sources such as Public Assistance (PA), Hazard Mitigation Assistance (HMA), Federal Highway Administration (FHWA), Federal Transit Administration (FTA), Department of Energy (DOE), Health Resources and Services Administration (HSRA), Federal Housing Administration (FHA), nonprofit foundations, and private corporations.

## **Manage Versions**

If leveraged by the Parish, our tracking system will be used to actively track and monitor PWs. This allows our team to examine versions, categories, obligations, and expenditures while offering the Parish an overall snapshot of the PA program. Monitoring versions, obligations, and expenditures is critical to ensuring compliance with overall PA program regulations and advancing recovery activities based on available funding.

## **Identify Alternate and Improved Projects**

In most cases, the PA program reimburses applicants for the completion of eligible permanent repair work on an actual cost basis. There are instances where applicants are reimbursed based on capped estimates, known as alternate projects, which require expertise in cost estimating. Our team has expertise in cost estimation methods, including developing consistent and accurate estimates, and will work with the Parish to understand when and how to engage in alternate projects. The same applies for improved projects, which offers the Parish an opportunity to make improvements while restoring the facility to its pre-disaster function and capacity.

## **Compliance**

Our extensive knowledge and understanding of the FEMA disaster recovery process provides an advantage in maintaining a successful disaster recovery program. Failure to comply with applicable laws and regulations can result in sizable refunds and increased scrutiny by oversight organizations. We have worked on numerous Presidentially Declared Disasters to assist grantees and sub-grantees to properly account for disaster relief funds, comply with applicable requirements, and obtain reimbursement for response and recovery projects. Along with this experience, our team brings a wealth of FEMA institutional knowledge to the process and can assist the Parish in expediting its disaster recovery process.



Our team is dedicated to assisting governmental, nonprofit and corporate entities to expedite financial recovery and mitigation after catastrophic loss through FEMA, other federal disaster grant programs, and insurance claims. We will combine our experience in financial recovery with our indepth knowledge of grant programs to assist Jefferson Parish in identifying the available financial recovery and mitigation options. Then, we will assist the Parish in applying for and using recovery and mitigation funding with a constant eye on complying with the associated legal, regulatory, and programmatic requirements.

### **Audit**

All communications relating to a project will be kept in separate project binders. It is important to keep detailed notes of any guidance or meetings with GOHSEP and/or FEMA staff and to further document discussions with follow-up correspondence. Documentation of informal federal or state guidance can be a significant factor in determining eligibility and may be submitted in an appeal process.

Once a project is complete, the subrecipient must submit requested documentation for GOHSEP and FEMA to process a final payment and to initiate the closeout of a project. Part of the closeout process may include compliance monitoring or audit. It is the subrecipient's responsibility to keep a record of all documentation for years after the projects have been closed.

Our team will conduct pre-audit activities in preparation for audit and closeout and will ensure all documentation is kept in both a paper and electronic format that is organized and easily referenced. Prior to requesting closeout of a project, we will conduct a final review of the project file to ensure all the documentation is present and will obtain missing documentation if possible or determine if there is a way to create any additionally required documentation from existing records.

### **Insurance Coverages**

Our professionals provide clients with decades of FEMA and insurance claims experience along with established processes, methodologies, and technology to assist organizations in managing the financial function of large disaster recovery and mitigation programs, assembling claims efficiently and achieving their recovery goals. We will provide the Parish with the right perspective and experience in the insurance recovery and review process so that proceeds are received from the appropriate funding sources and all FEMA, HUD, and insurance requirements are met.

From the initial kickoff meeting until the project closeout, our focus will be on the end goal: assisting the Parish not only to identify eligible costs on the front end, but also to assist in retaining those funds through closeout and any subsequent reviews or audits.

Our team will put their technical expertise to work on behalf of the Parish, analyzing insurance-related issues as they relate to specific projects— not just applying a one-size-fits-all approach to insurance considerations. We will then break down these issues into understandable components and key decision points, always taking the approach of educating and mentoring our federal, state, and local counterparts in the intricacies and specific applications of insurance considerations.

Team members David Odom and Kirk Fisher oversaw the largest Property Claims Settlement in US history with the BP Deepwater Horizon oil spill in the Gulf of Mexico. Both men, serving in their current capacity, championed this program initiative by customizing a business process for reporting metrics of this multibillion-dollar settlement.

## Issue Resolution and/or Appeals

The TCS/Plexos team has assisted several applicants through the FEMA appeals process. Having the experience with GOHSEP and FEMA appeals, we will assist the Parish with preparing the necessary request and supporting information for both a first and second appeal if necessary. Although appeals are submitted as a last resort, they are an important part of the FEMA program. Because the appeal process can add months or even years to the timeline of the project, the team will make every effort to ensure clear and ongoing communication exists and to proactively identify contentious issues. We will work towards a swift resolution of the issue and make every effort to clarify any misunderstanding before a time-consuming appeals process begins. When appeals do become necessary, our team has the experience, knowledge, and expertise to articulate the problem, provide presence and continuously monitor the situation until a decision is provided.

## Closeout

Currently, FEMA's small project threshold is set at \$131,100, and historically, more than 93% of the total count of PWs fall below this threshold. Developing a proactive set of policies and procedures to address these projects can streamline the disaster recovery and closeout process. By structuring grant formulation and administration processes around the Parish's internal financial management systems and preparing grant documentation consistently, our professionals can facilitate a streamlined application and administration process that expedites recovery. Depending in the needs of the Parish, we will engage in the following tasks to support grant closeout:

- **Compliance with all Deadlines.** Federal grant programs have varying deadlines associated with work conducted. The PA program has a six-month deadline for emergency work and an 18-month deadline for permanent work. We will develop and maintain a master schedule to ensure the Parish meets all deadlines and does not experience de-obligations as a result of administrative timelines. GOSHEP has the ability to extend deadlines for more complex projects. FEMA will also extend project deadlines on a case by case basis.
- **Reconciling PWs and Maintaining Versions.** In order to closeout PWs, we will assign accountants or closeout specialists to review all associated versions to ensure eligible costs are captured, ineligible costs are addressed, sufficient documentation is provided, and federal funding has been obligated. Our teams are skilled in understanding documentation requirements in accordance with 44 CFR Part 13, Office of Management and Budget (OMB) Circular A-87, and 2 CFR Part 200. We will apply industry-accepted sampling standards to evaluate the adequacy of documentation, and when documentation is not available, we will support the Parish to justify eligible costs in accordance with federal regulations.
- **Monitoring and Measuring Closeout.** Our team leverages closeout managers and tracking tools to keep the focus on monitoring and measuring progress toward closeout. By implementing these tools, we will help the Parish focus the same level of intensity at the end of the recovery as is focused at the beginning, thereby expediting closeout.
- **Preparing Closeout Reports.** The Plexos team will prepare all final closeout reports to support the Parish. This includes completing the Financial Status Report (Standard Form 425) by updating the basis for accounting, indirect costs, and cumulative transactions as necessary and appropriate. Our closeout specialists are skilled in financial status reports and will ensure that all associated documentation is updated and issues, including misuse of excess funds, do not arise.

Effectively managing closeout for large-scale disasters is increasingly complex and challenging. Recovery organizations like the Parish are tasked with competing priorities with the stringent expectations of GOHSEP and FEMA. We understand that a long history of success is not the only factor when looking at vendors. It is also important that the vendor has recent successes that demonstrate knowledge of the most up-to-date closeout processes, technologies, perspectives, trends, and issues. As summarized in Figure 5, the team possesses the necessary skills to achieve a successful closeout.



Figure 5. Plexos possesses what it takes to achieve a successful closeout.

## SECTION D. PROPOSER QUALIFICATIONS & EXPERIENCE

# QUALIFICATIONS & EXPERIENCE

**Years of Experience:** TCS has experience in federal programs, disaster services dating back to 2005, Hurricane Katrina: total of 17 years of experience. Plexos has over 10 years of experience handling FEMA CDBG and Mitigation programs with 3+ years handling FEMA PA and Covid 19. PWR, LLC has over 11 years of disaster recovery, FEMA experience.

**Obligated Funding to Date:** \$15 billion in FEMA CDBG and Mitigation; \$28 million in FEMA Public Assistance including Covid 19.

**Receipt of Reimbursed Funding to Date:** \$22 million reimbursed



# QUALIFICATIONS: TEAM CIVIC SOLUTIONS (TCS)



Team Civil Solutions (TCS) is a dba under Louisiana-based limited liability company Team Title, LLC, which has been providing real estate services to public and private sector for over 18 years (founded in 2004). Core to our business is our government services division. Since 2007, TCS has provided program and grants management services including, but not limited to, closing, buyout, easement, title, abstract, grants management, application development, CDBG consulting, escrow, disbursement and appraisal management services to State and

Federal government agencies throughout the Country.

Since 2012, TCS has developed customized software applications used in connection with delivery and implementation for various state, federal, and local programs including of CDBG Disaster Recovery programs.

## STATE AND FEDERAL GRANTS/CONTRACTS

Program	State/Local	Federal	Year Performed
USDA		X	2012-2013
SBA		X	2020-2021
HUD and Urban Development Exclusive Closing Agent		X	2012-2013
Terrebonne Parish CDBG Affordable Housing Grant Administration	X		2011-2013
St. John the Baptist Parish CDBG Hurricane Isaac HAP	X		2014-2018
ReStore Louisiana Housing Recovery Program Management with Solution 4	X		April 2017 -present
Louisiana Road Home	X		2017-2018
ReBuild Texas CDBG-DR HAP	X		2019-present
Puerto Rico Department of Housing	X		2019-present
ReBuild Florida CDBG-DR HAP	X		2018-present
ReCoverCA (California)	X		2022-present

### Louisiana Road Home

TCS closed **over 60,000 grant transactions and over 4,000 buy out transactions** for the Louisiana Road Home Program. TCS has also coordinated transfers out of Louisiana Land Trust's inventory (that were acquired through the buyout process) to local municipalities or other government entities. The majority of these transfers were bulk property transfers wherein up to 40 properties were transferred at one time. To date, Team Title (TCS) is still involved in the Road Home Program in the manner of completing back end curative work as well as working with Louisiana Land Trust to transfer remaining properties out of their inventory.

### Louisiana Restore Homeowner Assistance Program/ Solution 4 Buyout Program

TCS was involved in both closing and case management for the Restore Louisiana Homeowner Assistance Program. Regarding eligibility specifically, TCS has completed over 16,000 ownership verification title searches and occupancy verification based on tax assessor's records. Team Title (TCS) completed over 17,000 grant closings- the majority of which were completed 100% electronically. Specific to the Solution



# QUALIFICATIONS: TEAM CIVIC SOLUTIONS (TCS)

4 Buyout Program, TCS has completed 129 abstract searches (as well as updates) and subsequent title reviews wherein grades were assigned to files based on existing liens, ownership issues, successions needed, and various other factors. The Solution 4 Buyout Program offers two options- a strict buyout wherein the property is transferred wholly to Louisiana Land Trust and a servitude option wherein the applicant retains ownership of the property but there is a perpetual conservation servitude placed onto the property that strictly limits the use of the property. TCS works directly with applicants in order to cancel any existing judgments and/or mortgages. Further, TCS has identified what limited legal work is necessary and has worked directly with the program's limited legal provider in order to determine what the proper probate procedure would be for each specific file.



Since 2009, we have closed thousands of acquisition and divestiture closings for Louisiana Land Trust. Most recently, we have provided services for the following:

## **LOUISIANA LAND TRUST**

TCS has conducted 65 closings to date for the Solution 4 Buyout Program- seven of those closings were servitude options. Currently, Louisiana Land Trust has 58 properties in their inventory that were acquired through the Solution 4 Buyout Program, TCS will also assist LLT in transferring those properties to local municipalities or adjacent property owners.



## **Isle de Jean Charles**

TCS is prepared to coordinate closings for those individuals participating in the Isle De Jean Charles Resettlement program. Those eligible applicants will be resettling to a new community located in Schriever in Terrebonne Parish about 40 miles north of Isle de Jean Charles. TCS's role will include curative work that needs to be completed for applicants such as canceling existing judgments and/or mortgages against applicants as well as conducting title updates for the resettlement property. Last, TCS will coordinate with applicants to schedule and conduct closings wherein applicants will sign all necessary program documents as well as acquisition documents for their new home in the resettlement community.

## **Pecan Acres to Audubon Estates**

For the Pecan Acres buyout and relocation to Audubon Estates, forty-two title searches and subsequent reviews have already been completed identifying all proper property owners as well as identifying any curative work that needs to be completed. Also, similarly to the Solution 4 Buyout Program, grades were assigned to files based on existing liens, ownership issues, successions needed, and various other factors. TCS works directly with applicants in order to cancel any existing judgments and/or mortgages. Further, TCS has identified what limited legal work is necessary and has worked directly with the program's limited legal provider in order to determine what the proper probate procedure would be for each specific file. These applicants sold their properties to Louisiana Land Trust for a fair market value of the property and in some cases an additional incentive grant. In these closings, owners sign all necessary program documentation as well as the cash sale to LLT. Many of these applicants use the funds received immediately for the purchase of a new home. Those applicants choosing to relocate to Audubon Estates will essentially have two back to back closings. Their currently-owned properties in Pecan Acres will be transferred to LLT and they will subsequently complete purchase documents for their new homes in Audubon Estates. TCS is prepared to complete the remaining closings- those moving into the new community as well as the remainder of those who are opting out and choosing to locate elsewhere.

# TEAM CIVIC SOLUTIONS (TCS)

Project Experience: Program Name	Place of Performance	Responsibilities	Dates of Service
Louisiana Housing Finance Agency, Non-Profit Rebuilding Pilot Program	Covington, Louisiana	Title Search Services, Loan Preparations and Closing Services	February 2010 to 2013
Louisiana Housing Finance Agency, Neighborhood Stabilization Program	Covington, Louisiana	Document Prep, Closing and Escrow Services	March 2010 to 2013
Louisiana Housing Finance Agency, Rural Affordable Housing Initiative	Covington, Louisiana	Title Search Services	August 2010 to 2013
Terrebonne Parish Consolidated Government CDBG Affordable Housing Grant Administration	Covington, Louisiana	Subject Matter Expert CDBG, Compliance and Monitoring, Legal Services	September 2011 to 2013
United States Department of Housing & Urban Dev. – Exclusive Closing Agent for the State of Louisiana	Covington, Louisiana	Closing and Title Services	July 2012 to 2013
Louisiana Housing Corporation, HAP Program	Covington, Louisiana	Title Search Services and Software System of Record Development	January 2016 to 2018
St. John the Baptist Parish CDBG Hurricane Isaac HAP	Covington, Louisiana	Title Search, Document Prep, Closing and Escrow Services	May 2014 to May 2018
New Jersey DCA Renew Jersey Stronger, Hurricane Sandy CDBG Recovery Program	Covington, Louisiana	Eligibility and Ownership Verification	2013 to January 2014
State of North Carolina Department of Emergency Management, ReBuild NC CDBG-DR HAP	Raleigh, North Carolina	Program and Grants Management Services, Title, Closings, CDBG Subject Matter Expert, Process Development, Award Calculation	July 2018 to December 2019
State of Florida Department of Economic Opportunity, ReBuild Florida CDBG-DR HAP	Tallahassee, Florida	Subject Matter Expert CDBG/FEMA, Title, Closings, Process Development, Legal, Appraisal, PMO & Award Calculation	September 2018 to present
State of Louisiana Office of Community Development, Solution 4 Buy-Out Program, Great Floods of 2016 CDBG Recovery Program	Baton Rouge, Louisiana	Title, Closings, Process Development, Legal, Appraisal, PMO & Award Calculation, FEMA Coordination	November 2018 to present
Commonwealth of Puerto Rico, PR Dept of Housing R3 CDBG-DR HAP	Aguadilla, Puerto Rico	Process Development, Legal, Eligibility and Ownership Verification, Appraisal, PMO	May 2019 to present
State of Texas General Land Office, ReBuild Texas CDBG-DR HAP	Conroe, Texas	Closings, Process Development, & Grant Proceeds Escrow/Disbursement, FEMA Coordination	June 2019 to present

# ORGANIZATIONAL STRUCTURE



# PLEXOS



The Plexos Team consists of seasoned emergency managers who have been at the forefront of major response and recovery operations for decades. Our mission is to ensure program success.

Plexos Group, L.L.C. ("Plexos") is a Louisiana-based, industry-leading provider of large-scale program management, disaster response and recovery services, and technology solutions for federally-funded projects.

At Plexos, the leadership team has successfully obtained, delivered, and managed **more than \$100 Billion of federally funded programs** with similar and unique realities, priorities, and challenges. With combined program, construction, and grant management experience specializing in housing, mitigation, and infrastructure projects, their team of experts has demonstrated experience liaising with stakeholders at every federal, state, and local level in order to develop and deliver successful programs in a cost-effective manner.

Plexos offer a team of multi-disciplined program delivery professionals successful in both rural and high-density metropolitan environments. Their team of subject matter experts possess specialized skills including subject matter expertise for CDBG-DR, CDBG-MIT, and FEMA PA programs, engineering, project solicitation and procurement compliance for federally funded projects, means and methods of design and construction, technical assessments, planning, inspections, project management, grant application development, quality control and quality assurance, as well as federal coordination and collaboration.

Plexos was founded on large-scale program management expertise. Formed in 2012 following the BP "Deepwater Horizon" oil spill, Plexos was selected to manage one of the largest class-action settlements in U.S. history. They solved claims issues and developed a solution to support stakeholders across the oil-impacted coastal area. They ensured funding was expedited to claimants while meeting all regulatory and audit requirements.

For the past 10 years, Plexos has supported the management and implementation of more than \$40 Billion in disaster recovery funding across state and local governments. They have deep experience within HUD Community Development Block Grant Disaster Recovery (CDBG-DR) and Mitigation (CDBG-MIT), Federal Emergency Management Agency (FEMA) Public Assistance (PA) and Hazard Mitigation Grant Programs (HMGP), and U.S. Treasury programs, including:

- **\$38 Billion in Disaster Recovery, including CDBG-DR, MIT, and FEMA Programs**
- **\$2 billion in U.S. Treasury Programs — CARES Act and American Rescue Plan Act of 2021**
- **\$12 billion Deepwater Horizon Economic and Property Damage Settlement Program**

Plexos Group has been an integral part of successful disaster recovery teams focused on recovery and mitigation initiatives in Louisiana, Texas, Florida, New Jersey, New York, North Carolina, South Carolina, Puerto Rico, and the U.S. Virgin Islands, among many others.

- Large-scale Program Management Expertise
- \$40 Billion in Disaster Recovery Experience
- Leadership Team holds experience in \$100 Billion in Federally-Funded Programs



# PLEXOS



Today, Plexos is a large-scale disaster recovery company with decades of experience in the use, and most importantly, the coordination of funding streams to support disaster recovery operations.

Specific experience providing the most relevance and benefit to the execution of this project includes the following programs:

Louisiana GOHSEP FEMA Public Assistance Strike. This project supported the State of Louisiana and local parish governments in the closeout of FEMA Public Assistance programs across the state. Plexos partnered with Deloitte to work with parishes identified by GOHSEP as having the greatest difficulty in completing Public Assistance projects and compiling the necessary documentation to justify federal reimbursements and pass audit. The Plexos Team, led by Senior Vice President, Eric Kuntz, successfully closed out more than 1400 projects in the last two years. Eric will serve as Principal Project Manager on this project.

Louisiana GOHSEP FEMA Public Assistance Closeout. In 2020, Plexos, again teamed with Deloitte, successfully secured the bid to complete the closeout of public assistance programs for all FEMA PA programs in Louisiana. Currently, our team is supporting GOHSEP and the parishes to complete and close out projects ranging from Hurricanes Katrina, Rita, Gustav, Ike, and Isaac that have caused billions in damage across our communities.

East Baton Rouge Parish School System FEMA Public Assistance. As a result of the Great Flood of 2016, Plexos assisted CSRS and the EBR Parish School System with FEMA reimbursement operations program management, short and long-term recovery and mitigation efforts.

East Baton Rouge Parish FEMA Public Assistance. Plexos and CSRS were selected to perform Project and Program Management for East Baton Rouge City-Parish. Due to the complexity and wide range of damaged projects, Plexos' primary focus on the recovery efforts pertained to the oversight, planning and execution of all federal funds awarded to the City-Parish, procurement of contractors under the federal award, scope of work and costs per project, risk and stakeholder management, federal and state audit and coordination efforts between the state and FEMA.

Florida Division of Emergency Management FEMA Public Assistance Program for Hurricane Irma Recovery. Plexos managed the statewide validation and close out of FEMA PA Grants per the Stafford Act guidelines. The scope of services for this award included project management, comprehensive grant management, technical assistance to applicants, project worksheet approval, monitoring and enforcing compliance with program guidelines, auditing for programmatic and financial compliance with applicable laws, rules, regulations, and policies.

Florida Division of Emergency Management FEMA Public Assistance Program for Hurricane Michael Recovery. Plexos managed the statewide validation and close out of FEMA Public Assistance Grants. The scope of services included performing and tracking all grant management activities, using the appropriate grant management system. As part of the project approval process, our team conducted reviews of projects and assisted with the modification of site-specific projects.



# PWR, LLC



PWR, LLC was incorporated in Baton Rouge, Louisiana in January 2001, and is owned 100% by Amy Roberts. The company mailing address is 7353 Highland Road, Suite B3A Baton Rouge, LA 70808. The Women's Business Enterprise National Council has granted a National Women's Business Enterprise Certification to PWR, LLC. Listed below are four CDBG-DR Programs that PWR, LLC provided construction management services, along with key processes and/or developments accomplished by PWR, LLC on those Programs.

## Past Disaster Programs include:

- Rebuild Florida Program - Hurricane Irma CDBG-DR - 2019 to 2021
- Restore Louisiana Program - 2016 Floods CDBG-DR - 2017 to 2020
- New York Rising Program - Superstorm Sandy CDBG-DR - 2013 to 2017

## Construction Management Services Provided:

- Training and managing licensed contractors
- Remote training for construction project managers on change orders and construction inspections and weekly reporting
- Developing standard operating procedures for damage assessments, change orders and construction inspections
- Analyzing construction pricing and recommending to the Program new pricing
- Developing policies and procedures for Resilient Home Construction Standards
- Designed a construction management database for processing change orders and inspections. Included in the design was reporting on all construction tasks from notice to proceed through 100% completion. The database also captured lead base paint clearances, elevation certificate calculations, and a catalogue of construction bulletins and other construction training materials that was accessible to Program Contractors and state representatives
- Award consultations to Applicants to explain construction funding
- Conducted contractor vetting
- Processed funding for mobile home contracts
- Explained construction policies/procedures to Applicants
- Revising scope of work estimates based on State Historical Preservation Office requirements and Lead Base Paint Risk Assessment requirements
- Developed a method for Design Professionals to realign Program funding based on construction foundation drawings and the estimating software Xactimate, which enabled the Program to rapidly adjust funding so that Applicants could meet all elevation requirements.
- Designed a damage assessment process including the development of a template in the estimating software Xactimate that allowed for the highest level of efficiency and consistency in preparation of damage reports. The damage assessment process and template have since been used on numerous CDBG-DR programs.

# REFERENCES



## GOVERNMENT CONSULTANTS OF LOUISIANA



### TCS References:

Jeff Haley  
Chief Operating Officer, Louisiana Office of Community Development  
1201 North 3rd Street, Suite 3-150, Baton Rouge, LA 70802  
O: 225.341-2270 | [jeff.haley@la.gov](mailto:jeff.haley@la.gov)  
Program Management, Buyout & Title Services

Michael B. Taylor  
Executive Director, Louisiana Land Trust  
11100 Mead Road, #200, Baton Rouge, LA 70816  
O: 318-613-7701 | [mtaylor@landtrust.us](mailto:mtaylor@landtrust.us)  
Program Management, Buyout & Title Services

Patrick Keller, Louisiana Land Trust  
11100 Mead Road, #200, Baton Rouge, LA 70816  
225-773-1548  
[pkeller@landtrust.us](mailto:pkeller@landtrust.us)  
Program Management, Buyout & Title Services

Gordon King, Government Consultants of LA, Inc.  
Office 225.344.5001 | Cell 225.252.0275

### Plexos References:

Louisiana GOHSEP Strike Team and Public Assistance Closeout  
James Waskom, GOHSEP Director, (225) 925-7345

East Baton Rouge Parish School System, FEMA Public Assistance Program  
Project Reference: Tim Barfield, President, CSRS, (225) 769-0060

Florida Division of Emergency Management for Hurricane Irma Recovery and Hurricane Michael Recovery  
Jill Reyes, Director, RSM, (321) 508-1895

# PERFORMANCE STANDARDS

We agree to the Performance Standards listed on page 25 of the RFP:

## 5.1 Performance Requirements

- Proposer's timely submission of quarterly reports
- Proposer's submission of accurate and itemized applications and reimbursement requests
- Proposer's adherence to project schedule completion dates
- Proposer's ability to provide key personnel with knowledge and technical expertise

## 5.2 Performance Measurement/Evaluation

- Did the Proposer obtain reimbursement for all obligated funding?
- Did the Proposer respond to Parish management in a timely manner?
- Were complaints/problems resolved in a reasonable and cooperative manner?
- Was the Proposer reasonable and responsive to FEMA requests for information?
- Were changes in key personnel made? How often? With or without notice?
- Was staff knowledgeable in key areas of funding assistance?



Mr. Richards is the Owner of Team Civic Solutions and an Attorney at Law. He possesses 14 years of experience on a multitude of CDBG-DR projects. Mr. Richards recently supported the Restore LA project in response to the great Floods of 2016. While delivering that project we closed over 15k grants and verified home ownership for roughly 20,000 applicants. Working as the Project Director for TCS during its work on Louisiana's Road Home Program, Mr. Richards closed more than 60,000 Grant Transactions and more than 4,000 sale transactions since June of 2007 as one of two title companies through 2009, and now as the sole title company performing closing and title services for the program. Mr. Richards created and carried out accurate, error-free, yet fast escrow account disbursement. With Mr. Richards experience and expertise in Escrow Accounting, he was able to disburse up to \$60M within a 72-hour disbursement deadline imposed by HUD.

#### **RELEVANT PROJECT EXPERIENCE**

Acted as Project Director, Responsible for development and implementation of all project policies and procedures. All key staff reported directly to the Project Director. Project Director has been directly responsible for the successful execution and implementation of all of TCS's past performances:

CDBG REO Property Divestiture Program, LA Land Trust

Restore Louisiana Housing Recovery Program  
Management, Louisiana Office of Community  
Development

Louisiana Road Home Program, State of Louisiana, Office  
of Community Development

ReBuild Florida, Innovative Emergency Management

ReBuild North Carolina Hurricane Matthew CDBG-DR  
Recovery Program, North Carolina Department of Public  
Safety

#### **EDUCATION**

J.D., Loyola University  
New Orleans 2002  
Cum Laude, Graduated Top 5% of class, William S. Crowe  
Scholar, Editor for Loyola Law Review

Bachelor of Arts, LSU 1999

#### **HONORS**

Member of the Moot Court Staff  
Participant in the International Commercial Arbitration  
Moot Court Team (placed 8th in the world competition  
held in Vienna, Austria)

#### **PROFESSIONAL EXPERIENCE**

2010-Present: Gulf Coast Lending Services, Inc. Co-  
owner/secretary; originates residential and commercial  
mortgages and loans.

2004-Present: TCS Co-owner, member of a full-service title  
agency with offices in Mississippi and Louisiana/

2003-Present: Richards, Higdon, Huguet & Campani, LLC.  
Managing Member of law firm with offices in Covington  
and Metairie, Louisiana, whose practice focuses on  
franchise law, commercial litigation, real estate law, and oil  
& gas law





Mr. Campani is a Partner and Attorney-At-Law at Team Title, LLC. His primary role includes drafting original documents for residential and commercial real estate transactions, abstracts and examination of titles, curative work, conducting closings, issuing title opinions and insurance policies, coordinating underwriting requirements with lenders, resolving post-sale curative issues with insurers, reviewing contracts, small business formations, franchise representation, civil litigation (including real property actions), estate planning, family law and successions.

#### **RELEVANT PROJECT EXPERIENCE**

Mr. Campani is a certified Quickbase Builder with a decade of experience building Quickbase apps for managing legal, title and mortgage workflows. He has built apps to handle closings, appraisals and disbursements for multiple CDBG funded programs, including Restore Louisiana, ReBuild Texas, ReBuild New Mexico, ReBuild Florida and R3 (Puerto Rico). In addition, he created an app to manage more than 600 legal professionals located across the United States to supplement staff for the U.S. Small Business Administration's EIDL Program, including integrations with DocuSign and T-sheets, to manage document execution and weekly schedules.

Louisiana Land Trust - draft original closing documents for land transfers from LLT to contractors and nonprofit organizations, conduct LLT closings, perform curative work in cooperation with LLT to clear title to properties in inventory, initiate or intervene in civil proceedings as necessary to clear title including filing successions, partitions and tutorships, serve as liaison between LLT and First American Title Insurance Company and perform curative work to resolve outstanding title claims for First American;

LHFA Nonprofit Rebuilding Pilot Program - abstract and examine title to applicant properties, issue title opinion letters.

#### **EDUCATION**

J.D., Tulane University School of Law, New Orleans 2000  
Tulane Law Scholarship; Phi Alpha Delta Law Fraternity - Justice/Vice Justice; International Law Society; Law and Philosophy Society; Moot Court; Westlaw Instructor

Bachelor of Arts, Political Science, University of Arizona 1997

Clifton Wilson Scholarship; Phi Alpha Delta Pre-law Fraternity - Mock Trial team, Co-authored National Mock Trial Handbook, Chairman of Professional Committee; Arizona Model United Nations- President; National Model United Nations- Judge for Model I.C.J.

#### **HONORS**

Member of New York and Louisiana State Bar Associations; Admitted to practice before U.S. District Courts for the Middle, Western and Eastern Districts of Louisiana; Louisiana Notary Public.

#### **PROFESSIONAL EXPERIENCE**

2007-Present: Richards, Higdon, Huguet & Campani, LLC/  
Team Title, LLC/ TCS

2018: Title Management Group

2005-2007: Arizona State University Contract  
Administrator

2002-2004: Roussel & Roussel, Associate Attorney

1998-2002: Pierce & Bizal, Associate Attorney



Kevin Pond has provided client support for software integration, program management, and highly-technical customizations since 2003. His experience working on large private and government contracts and depth of understanding of database management has allowed him to be a valuable component on our software applications team. Kevin is involved with client development and contracting, program consulting, and serves in a training advisory role for TCS.

#### **RELEVANT PROJECT EXPERIENCE**

**Veriforce:** Corporate Development for upstream operators as well as venture capital/investment firms to help implement a system in which portfolio companies can easily assess and mitigate risks related to insurance, agreements, and safety in general.

- Assisted clients across North America implement a total contractor management/risk mitigation system
- Worked with clients to identify cost effective avenues for standardized training and safety program development
- Dealt with agreements (MSAs) and contract/document management, insurance verification, safety program evaluations, safety compliance, and audits and training as it relates to risk mitigation

**Windward Group:** Recruited back to lead and to manage all sales and strategic accounts. Objectives include organizing leadership meetings on strategic vision, tactical execution of the sales team, and providing sales team education on specific verticals and the opportunities within each vertical.

- Led critical initiatives to form strategic relationships with software manufacturers
- Acquired strong sought-after leaders in the industry
- Successfully negotiated contracts and reseller agreements with some of the largest software/hardware manufacturers in the world

**BIS:** Recruited to open a new office in an effort to expand our organization's coverage across the Southeast, Managed the day-to-day operations as well as the recruitment, hiring, and training of key sales representatives to specifically target strategic verticals in Healthcare, Oil & Gas and Government to sell the value of using Artificial Intelligence within their organizations

#### **EDUCATION**

Bachelor of Arts: Public Relations,  
2000 Louisiana Tech University

Associates Degree: 1998 Southwest Mississippi  
Community College

#### **PROFESSIONAL EXPERIENCE**

2020-Present: Team Title, LLC/ TCS

2019- 2020: Veriforce

2017- 2019: The Windward Group

2015-2017: BIS- Edmond, Oklahoma

2003-2015: The Windward Group

2001-2003: Time Plus Payroll Services

2000-2001: Enterprise Rent-A-Car Management



Gregory Kelly is an Operations, Compliance, and Escrow Manager with 14 years of experience in the management, oversight, reporting and reconciliation of CDBG homeowner assistance program funding. Mr. Kelly directly developed, implemented, and managed processes for the timely disbursement of CDBG funds in connection with homeowner assistance programs. Mr. Kelly directly managed a disbursement team, and instituted fraud and other controls that resulted in a less than one one-hundredth of one percent disbursement error rate. To date he has managed over 100,000 grant disbursements in excess of four billion dollars. For SBA's EIDL COVID-19 Emergency Assistance Program Mr. Kelly oversees 11 Project Managers and 650 legal professionals who assist in the Program's legal processes ultimately resulting in funding to small businesses.

#### **RELEVANT PROJECT EXPERIENCE**

##### **Accounting Manager, Team Title, LLC**

Directly oversaw all accounting processes and personnel. Directly involved in the development of disbursement procedures and security measures implemented for accounting department.

- Louisiana Road Home Program

##### **Operations Manager, Team Title, LLC**

Assisted in the development and implementation of Closing processes software in connection to workflow and data management. Directly oversees the onboarding and operational processes of all personnel activities needed to meet and exceed each Program's deliverables.

- Restore Louisiana Housing Recovery Program Management with Solution 4 Buyout Program, Louisiana Office of Community Development
- Louisiana Road Home Program, State of Louisiana, Office of Community Development
- ReBuild Florida, Innovative Emergency Management
- ReBuild North Carolina Hurricane Matthew CDBG-DR Recovery Program, North Carolina Department of Public Safety

#### **EDUCATION**

B.A., Sociology, Our Lady of Holy Cross College, 1996

A.A., Electronic Engineering, R.E.T.S. Training Center, 1991

Electronic Engineering Technology Program, 1990

#### **CERTIFICATIONS/TRAINING**

Supervisory Skills for the Effective Manager

Canon S.P.I.N. Training

Certificate, Data Communications Course, 1990

#### **PROFESSIONAL EXPERIENCE**

2007-Present: Team Title, LLC/ TCS

2017-Present: Road Home Housing Assistance Program, Louisiana Office of Community Development



Cody Perilloux has a finance background and has served in numerous banking and financial roles throughout his career. He has 20 years of experience working in the mortgage industry, working with loan servicing companies, underwriters, tax accessors and private lenders. Since 2007, Cody has provided project operations and served as a closing specialist in connection with the implementation and delivery of homeowner assistance programs. Projects include numerous state and municipal programs in Louisiana, Texas, and North Carolina. Specializations include CDBG funded projects, closings, and grant administration.

### RELEVANT PROJECT EXPERIENCE

#### **TCS/ Team Title**

CDBG REO Property Divestiture Program, LA Land Trust

- Project Manager: implementation of all project policies and procedures
- Close working relationship and interaction with assessors, lean holders, and mortgage holders
- Managed tenant payout statements
- Negotiated Short Sales

Contact: Patrick Keller, Louisiana Land Trust  
225-773-1548

Restore Louisiana Housing Recovery Program  
Management, Louisiana Office of Community  
Development

- Acted as Project Manager, Responsible for implementation of all project policies and procedures
- Supervision of all key staff
- Involved in the successful execution and implementation of the program

Contact: Jeff Haley, Louisiana Office of Community  
Development  
225-341-2270

Louisiana Road Home Program, State of Louisiana, Office  
of Community Development

- Acted as Project Manager, Responsible for implementation of all project policies and procedures
- Supervision of all key staff
- Involved in the successful execution and implementation of the program

Contact: Jeff Haley, Louisiana Office of Community Dev.  
225-341-2270

*21 years of experience*

### EDUCATION

Loyola University, New Orleans, LA  
Bachelor of Social Sciences, 2001

### PROFESSIONAL EXPERIENCE

2004-Present: Team Title, LLC/ TCS

2010-Present: Gulf Coast Lending (sister company)

2002-2007: Integra Financial Group

State of Florida Department of Economic Opportunity,  
ReBuild Florida CDBG-DR HAP, Innovative Emergency  
Management

- Acted as Project Manager, Responsible for implementation of all project policies and procedures
- Supervision of all key staff
- Involved in the successful execution and implementation of the program

Contact: Jon Mabry, Innovative Emergency Management  
601-953-4562

ReBuild North Carolina Hurricane Matthew CDBG-DR  
Recovery Program, NC Department of Public Safety

- Acted as Project Manager, Responsible for implementation of all project policies and procedures
- Supervision of all key staff
- Involved in the successful execution and implementation of the program

Commonwealth of Puerto Rico, PR Dept of Housing, R3  
CDBG-DR HAP

- Acted as Project Manager, Responsible for implementation of all project policies and procedures
- Supervision of all key staff
- Involved in the successful execution and implementation of the program

State of Texas Gen Land Office, ReBuild Texas CDBG-DR HAP

- Acted as Project Manager, Responsible for implementation of all project policies and procedures
- Supervision of all key staff
- Involved in the successful execution and implementation of the program



Zachary Higdon is a Project Analyst with 3 years of experience in the management, oversight, reporting and case management for government programs including grant management, housing, and disaster case management. Projects have included regulatory adherence to FEMA, HUD, Housing Authority, and Small Business Administration disaster recovery programs.

Throughout his assignments, Zach has directed large teams of legal professionals, provided ongoing reporting and accounting, delivered financial statements, and determined eligibility of applicants and subapplicants.

#### **RELEVANT PROJECT EXPERIENCE**

##### **Restore Louisiana Project**

- Communicated with applicants to get them scheduled for closing
- Completed over 16,000 closings with this program
- Assisted with document gathering, ensuring accuracy and completeness
- Reviewed financial records to determine AMI% for applicants
- Sent out reports at the end of the day to keep track of progress
- Determined applicant eligibility based on income

##### **SBA PPP Loan Project**

- Managed a team of over 60 attorneys, paralegals, and legal assistants
- Sent out daily reports to employees

##### **Rebuild Florida Project (ongoing)**

- Communicated with applicants to get them scheduled for closing
- Completed over 4,000 closings with this program, thus far
- Assisted with document gathering, database filing, and reporting of updated file statuses
- Sent out daily reports to track progress
- Reviewed US Citizenship documents for applicants eligibility
- Participate in weekly meetings to provide status updates to supervisors and government authorities

#### **3 YEARS OF EXPERIENCE**

#### **EDUCATION**

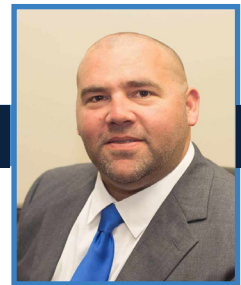
B.S. Business Management  
Louisiana State University 2018

#### **PROFESSIONAL EXPERIENCE**

2018-Present: Team Title, LLC/ Team Civic Solutions

2016-2017: Keller Williams Realty Red Stick Partners





Jody Vidrine has worked in Project Operations and acted as a Closing Specialist for numerous state and municipal programs in Louisiana, Texas, and North Carolina. Specializations include CDBG funded projects, closings, funds disbursements and financial reporting.

*10 years of experience*

#### **EDUCATION**

University of New Orleans  
Bachelor of Business Administration 2005

#### **RELEVANT PROJECT EXPERIENCE**

##### **TCS/ Team Title**

Community Development Block Grant: Project Operations & Closing Specialist

Project coordination, including, but not limited to the Louisiana Road Home Program, Louisiana Land Trust contract, St. John Parish Project, St. Bernard Parish Project, Rebuild NC, Restore LA and the Rebuild Texas Project.

- Created Funds Flow Analysis for the State for month end
- Assists and supervises escrow, disbursement, and reconciliation process (TX GLO)
- Disburse funds to qualified applicants
- Established strategic closing process to accommodate mass closings
- Produce & edit financial reports
- Meet with applicants to discuss process, solutions and projections for positive outcomes.
- Oversaw grant closing process of over 25,000 applicants
- Responsible for bi-weekly payroll

##### **Additional Accounting Experience:**

- Performed multiple bank reconciliations and managed accounts for multiple hundreds of millions of dollars.
- Dominion account- revolving credit line with the bank
- Mississippi river bank account, which is used to deposit all funds received in the Venice location
- Reconciled Diesel, Gasoline, Biofuel, Road use Diesel and Lubricant Inventory Monthly
- Management and oversight of employees to obtain monthly month-end tank accounting for inventory and financial reporting
- Allocated diesel, gasoline, biofuel and lubricant inventory sales to actual sales locations. Example: company use, road use etc. This was a process that took 3 or 4 days to complete from start to finish.
- Prepare Monthly and Yearly Sales Tax Returns
- Completed sales tax returns for up to 22 parishes on a monthly basis, as well as state taxes.
- Maintained General Ledger Through Journal Entries

#### **PROFESSIONAL EXPERIENCE**

2012-Present: Team Title, LLC/ TCS

2003-2012: John W Stone Oil Distributor LLC

2005-2008: Stewart Enterprises



**PAUL WALTON ROBERTS** | PROJECT ROLE: PROJECT MANAGER  
PWR LLC

Over 29 years experience in disaster recovery, construction, real estate, and finance. Worked on the implementation of several key CDBG-DR housing programs in Mississippi, Louisiana, Texas, New Jersey, New York, and Florida. Extensive experience in program and construction management services for production, policies, quality assurance, damage assessments, inspections, standard operating procedures, construction estimating, feasibility analysis, pricing analysis, elevation, residential building codes, appeals, and applicant/contractor interface. A proven resolution expert with excellent verbal and written communication skills with grantees, homeowners and contractors.

#### **EDUCATION**

Louisiana State University  
Bachelor of Science 1991

#### **EXPERIENCE**

##### **P.W.R., L.L.C. - Construction Estimating / Change Orders, Texas and Florida (2021 to present):**

- Conducted preconstruction site visits and revised scope of work in Xactimate
- Estimated construction scope in Xactimate using modular home foundation construction drawings
- Developed change orders in Xactimate based on unforeseen conditions
- Followed policies and procedures for CDBG-DR Programs from Hurricane Harvey in Texas, Hurricane Irma in Florida and Hurricane Michael in Florida

##### **P.W.R., L.L.C. - Program Construction Manager, Rebuild Florida Housing Repair and Replacement Program Hurricane Irma, Tallahassee, Florida (2019 to 2021):**

- Provided construction management services to 25 Florida licensed contractors including training on all policies and procedures along with developed monthly construction bulletins
- Remotely trained and managed 9 construction project managers for production of change orders and construction inspections along with weekly reporting
- Designed construction workflow and construction database systems
- Analyzed construction pricing for recommendations to Florida Department of Economic Opportunity
- Developed policy and procedures for Resilient Home Construction Standards

##### **P.W.R., L.L.C. - Senior Project Manager, Restore Louisiana Homeowner Assistance Program, Baton Rouge, Louisiana (2017 to 2020):**

- Provided the initial design and development of damage assessments, construction standard operating procedures, and assisted in the construction workflow design of the system of record
- Managed 18 construction technical advisors in 4 statewide locations, which included award consultations to explain damage assessments, contractor vetting, processing mobile home contracts, issuance of notice to proceeds, processing construction inspections for disbursements, reviewing construction drawings and elevation certificates, and explaining construction policies, to 6,400 Applicants managing their own construction projects to 100% completion
- Developed multiple requests for decisions on construction policies, and developed Program caps for MHU elevation funding
- Provided consistent support to all program departments and Louisiana Office of Community Development

**P.W.R., L.L.C. - Project Manager, New York Rising Housing Program, Mineola, New York, (2013 to 2017):**

- Trained and managed the production of 30 quality assurance reviewers on over 20,000 damage assessments
- Trained and managed 25 construction technical advisors to provide construction advisory services at multiple site locations for applicants, design professionals, contractors, and/or program staff
- Realigned program funding with design professionals based on elevation construction drawings
- Developed standard operating procedures for various scope clarifications, and construction policies
- Developed construction FAQs for call center operators
- Conducted feasibility analysis for reconstruction awards
- Managed all construction appeals and special needs funding
- Developed new construction costs estimates
- Resolved construction issues with constituent services
- Reviewed and revised scope of work based on State Historical Preservation Office requirements

**P.W.R., L.L.C. - Quality Assurance and Production Manager, Repair, Reconstruct, Elevate and Mitigate Program, Wall, New Jersey, (2013):**

- Organized the inspection team, trained the inspectors, developed damage assessment templates and quality assurance procedures, and managed the overall effort for damage assessments
- Developed key time saving concepts to reduce the time needed to prepare and submit reports

**P.W.R., L.L.C. - Inspector, City of Galveston Hurricane Ike Housing Recovery Program, Galveston, Texas, (2012):**

- Responsible for the overall inspection, scoping and cost estimation of single-family housing units

**P.W.R., L.L.C. - Lead Damage Assessor, Neighborhood Home Program, Hurricane Katrina CDBG-DR Housing Recovery Program, Mississippi (2011-2012):**

- Organized and lead the team to effectively cover all nine counties to accomplish the damage assessments, detailed scoping, and cost estimating

**The Shaw Group - Construction Coordinator, Small Rental Property Program, The Road Home Program, Louisiana Office of Community Development, Baton Rouge, Louisiana (2010-2011):**

- Managed Program approved contractors to ensure the timely and cost-effective completion of construction projects on one to four family rental dwellings

**Power Homes, LLC, - Louisiana Licensed Residential Contractor, Baton Rouge, Louisiana (2001-2012):**

- Owned and operated a Louisiana licensed residential construction company that constructed over 160 homes in the Greater Baton Rouge area

**Power Real Estate, LLC, - Louisiana Licensed Residential Contractor, Baton Rouge, Louisiana (2001-2012):**

- Owned and operated a Louisiana licensed real estate brokerage company

**Regions Bank - Vice President, Commercial Real Estate, Baton Rouge, Louisiana (1993-2002):**

- Provided financial lending services to real estate developers, investors, and licensed contractors on commercial and residential properties
- Conducted construction inspections on all types of real estate from commercial buildings, subdivision developments and residential homes to approve funding advances

**David F. Odom, PE PMP, President and CEO** of Plexos Group, L.L.C, is a Project Management professional with masters' degrees in finance and engineering. He has more than 29 years of relevant experience. His experience with federal housing programs includes the *Puerto Rico Department of Housing's R3 Program*, the *USVI's Emergency Home Repair (STEP) Program*, the *Restore Louisiana Homeowner Assistance Program*, the *New York City Build-it-Back Program*, the *Texas Homeowner Assistance Program*, the *Louisiana Road Home Program*, and the *Louisiana Small Rental Property Program*.



David F. Odom

David has extensive experience serving in various capacities on some of the largest programs in U.S. history, including the Louisiana Road Home Program resulting from Hurricanes Katrina and Rita and the Deepwater Horizon Economic & Property Damage Settlement Program resulting from the BP oil rig oil spill. His experience also includes economic opportunities that provide affordable, sustainable housing to local, national, and international areas impacted by natural or man-made disasters. David has presented technical topics to different groups and forums, including the U.S. Secretary of Housing & Urban Development, and presented at training seminars in the United States, Canada, Mexico, South America, and Russia.

### PRINCIPAL PROJECT MANAGER — ERIC KUNTZ

**Eric Kuntz, Senior Vice President of Compliance, Plexos Group, L.L.C.**, has 28 years of public and private experience, including 22 years of emergency management and 20 years of military experience. Eric serves as a policy advisor for projects in USVI, Louisiana, Florida, Texas, Colorado and South Carolina. His ability to work with multiple federal, state and local agencies has assisted in the disbursement of billions of federal dollars to affected stakeholders.

Prior to Plexos, Eric served as the State Coordinator of Recovery for the Texas Division of Emergency Management (TDEM), managing \$5.2 billion in federal disaster funds for 17 declared disasters, closing seven disasters and 55 Fire Management Assistance Grants. Prior to TDEM, he served as the FEMA Region VI Planning Chief for the Louisiana Recovery Office. He is a retired commissioned officer from the Louisiana Army National Guard, with assignments to the Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP) as the Critical Infrastructure Coordinator and Battle Captain during state and federally declared disasters.

Major disasters include Hurricanes Katrina, Rita, Gustav, Ike, Harvey, Maria and Irma as well as numerous flooding and severe weather events. Other assignments include the Space Shuttle Columbia disaster, 9/11 response, Deepwater Horizon oil spill, FEMA Region VI liaison to the NFL and the City of New Orleans for Super Bowl XLVII, liaison to U.S. Secret Service for dignitary visits and other significant sporting events. Eric is a subject matter expert on federal policy and procedure for all FEMA-related projects.



#### Louisiana Experience

**2009-2012**  
**Louisiana Recovery Office, Department of Homeland Security**  
*FEMA Region VI Planning Chief*

**2003-2009**  
**Louisiana Governor's Office of Homeland Security & Emergency Preparedness (GOHSEP), Department of Defense**  
*Critical Infrastructure Coordinator*

**1997-2011**  
**Louisiana Army National Guard,**  
*Joint Forces Headquarters, J-3 Operations, Captain 0-3 Infantry*

*"Responding to emergencies and leading disaster recovery initiatives is not just a job; it's my career. Over the last 25 years, I've worked with the best of the best and earned my place among them. I take my career very seriously and hold sacred the trust survivors place in me to spearhead their recovery efforts."*

— Eric Kuntz

## SENIOR ADVISOR — WILLIAM J. DORAN III, CEM

**William J. Doran III, CEM, Vice President of Response and Recovery, Plexos Group, L.L.C.**, is a retired Louisiana Air National Guard colonel and subject matter expert with more than **30 years** of public and private experience on FEMA programs and policy.

For seven years, Bill served as a FEMA Federal Coordinating Officer for FEMA Region VI overseeing many large-scale, multi-jurisdictional federally declared disasters around the country, coordinating efforts for nine states, and directly influencing federal policy for disaster response and recovery initiatives.

Bill also served as the Interim Louisiana Recovery Office Director for Hurricanes Katrina and Rita, and subsequently as the Response Division Director for Region VI. Bill was the principal presidential appointee for 25 federally declared disasters including individual assistance, public assistance, mitigation, long-term recovery planning and implementation programs.

Bill's disaster experience includes Hurricanes Katrina, Rita, Gustav, Ike, Isaac, Harvey; the Moore, Oklahoma tornado, the Colorado floods of 2013, the Texas floods of 2015, and the Louisiana floods of 2016.



### Louisiana Experience

**2010-2018**  
**FEMA, Region VI,**  
**DR-4277, DR-1603,**  
*Federal Coordinating*  
*Officer*

**2010-2015**  
**LA Air National Guard,**  
**US Air Force**  
*Colonel (Retired)*

**2007-2010**  
**LA National Guard,**  
**GOHSEP**  
*Joint Director of Military*  
*Support/ Military Liaison*

**2006-2007**  
**LA National Guard**  
*Military Liaison/ Strategic*  
*Plans & Policy Officer*

**2003—2006**  
**LA GOHSEP**  
*Operations Division Chief*

**1995-2003**  
**LA Air National Guard**  
*Commanding Officer*

*"I will use my experience as a retired FEMA Federal Coordinating Officer, a Certified Emergency Manager, and presidentially appointed government official leading Louisiana through the response and recovery of some of its largest historical events, including Hurricanes Katrina, Rita, Gustav, and Ike. I am excited to implement solutions in my home state of Louisiana that will help the City of DeRidder recover from this catastrophic event. "*

— William J. Doran III, CEM



## PROJECT MANAGER — TERRY VALLARAUTTO

**Terry Vallarautto, Project Manager, Plexos Group, L.L.C.** , brings **33 years** of emergency management experience including serving as Branch Chief of the Construction Facilities Management Office (CFMO) of the Louisiana National Guard, S-7 Design Engineer, and Project Manager responsible for the refurbishment, stabilization and historic preservation of the New Orleans school facilities \$1.2 billion Recovery School District (RSD) Program.

As project manager for the CFMO, Terry was responsible for the \$600 million new military construction for the Hurricane Katrina/Rita rebuild program.

As Battle Captain for the Louisiana GOHSEP's Emergency Operations Center, he served as state liaison to Emergency Preparedness Directors in St. Bernard, Plaquemines, and Orleans Parishes. He coordinated emergency requests with FEMA, state, parish and local officials.

Terry's experience also includes appointments to the Louisiana Totally Interoperability Environment USER Group, Technical Committee, and LA RECON USER Group.



### Louisiana Experience

**2020-present**  
**Louisiana National Guard — Construction Facilities Management Office (CFMO)**  
*Branch Chief*

**2019-2020**  
**Louisiana National Guard — 225<sup>th</sup> Engineer Brigade**  
*Design Engineer*

**2011-2019**  
**GoTech & St. Martin/Brown, New Orleans**  
*Project Manager*

**2006-2011**  
**Louisiana National Guard — CFMO**  
*Project Manager*

**2005-2006**  
**Louisiana GOHSEP**  
*Battle Captain, State EOC*

**1987-present**  
**Louisiana Army National Guard**  
*Lieutenant Colonel*

*"I am committed to using my 33 years of emergency management expertise to assist the City of DeRidder with the recovery from Hurricane Laura.."*

— Terry Vallarautto

## SENIOR GRANT MANAGER — KEITH HOWARD

**Keith Howard, Project Manager, Plexos Group, L.L.C.** , brings **13 years** of experience assisting clients in the administration of federal grant programs for disaster recovery. Keith started his career during the disaster recovery of Hurricane Katrina in 2007 and was responsible for the grants management and closeout functions for the Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP) in Louisiana.

Keith is experienced in leading teams of more than 30 members in the disaster recovery process beginning with preliminary damage assessments (PDAs) and throughout, including appeals and the closeout process. He is experienced in the development of project worksheets (PW) for Categories A-G and RSMeans cost estimations.

Keith has served as project specialist, Public Assistance Coordinator (PAC), FEMA PA subject matter expert, Project Manager, Trainer, QA/QC review specialist, Emergency Support Function (ESF #5) branch manager in addition to Group Lead over grant management and closeout teams for numerous disasters including Maria: DR-4339, Katrina: DR-1603, Gustav: DR-1786, Rita: DR-1607, Ike: DR-1792 along with various smaller declarations.



### Louisiana Experience

**2007-2018**  
**Louisiana Governor's  
Office of Homeland  
Security and  
Emergency  
Preparedness**  
*Group Lead / Team Lead*

**State of Louisiana**  
*Leadership Certification  
Series*

**Louisiana State  
University**  
*Construction  
Management Certificate*

*"Hurricane Laura will be the first major disaster to implement the new regulatory changes found within the latest Public Assistance Program and Policy Guide (PAPPG Ver. 4). As subject-matter experts, my team and I will bring in-depth knowledge and understanding of these regulations allowing the City of DeRidder to attain the maximum amount of reimbursements while working within the programmatic guidelines."*

— Keith Howard

## ADDITIONAL TEAM MEMBERS

### Sam Saltaformaggio

*Grant Manager*

Sam has **13 years** of disaster recovery experience in Louisiana, Texas and Mississippi. He holds Lead Certifications in Louisiana and Mississippi and an Insurance Adjusters All Lines License in Texas. He has served in various capacities for multiple contractors including FEMA Public Assistance Closeout Specialist, QAQC Hazard Mitigation Analyst, Elevation Grant Program Inspector and Surge Team Manager.

### Kristin David

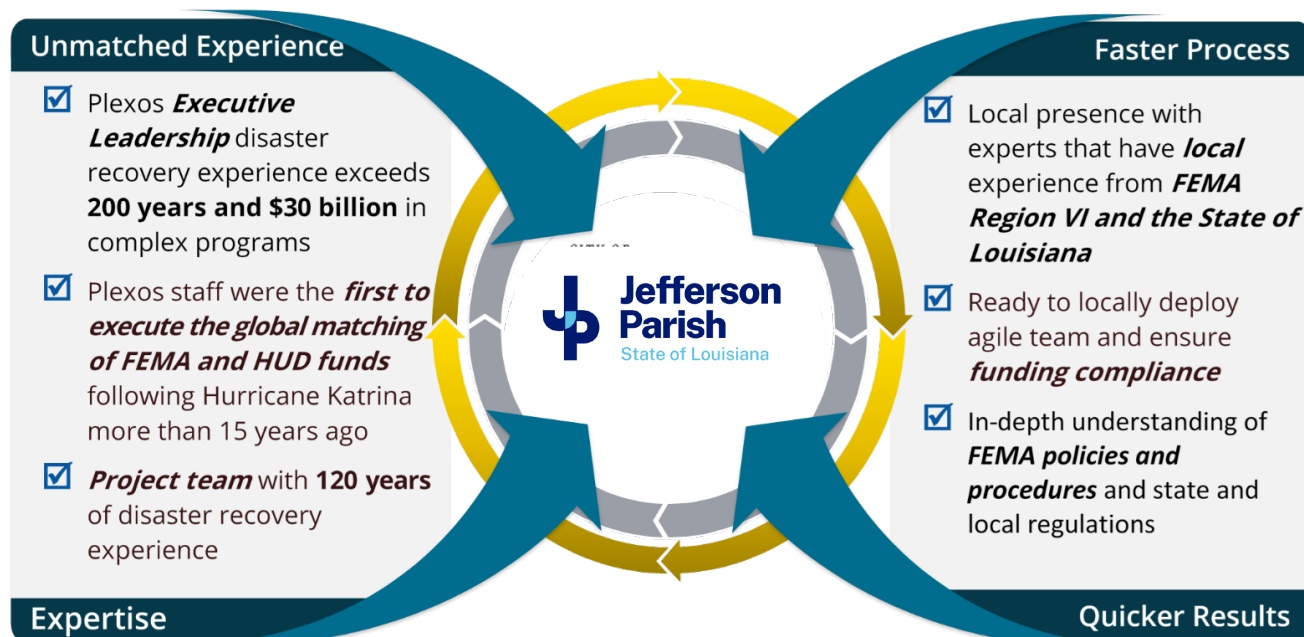
*Document Control  
Manager*

Kristin has **6 years** of disaster recovery experience. She has served as Grant Manager for the New York Rising Program during the recovery of Superstorm Sandy and as Labor Compliance Officer for South Louisiana disaster recovery projects.

### Yagini Joshi

*Budget Analyst*

Yagini has **3 years** of disaster recovery experience. Her experience includes financial modeling and reporting, business planning, project controls, improvement strategies, and developing dashboards to track and display metrics. In her various roles she has analyzed complex data sets, synthesized information into easily comprehensible reports and facilitated with senior management to deliver quality products. More recently, Yagini has served as a reporting specialist with the Restore Louisiana Program, a HUD-funded CDBG-DR housing program.



# TEAM CIVIC SOLUTIONS (TCS) PROJECT EXPERIENCE

## CDBG REO PROPERTY DIVESTITURE PROGRAM

Louisiana Land Trust (“LLT”)

2009-2010, 2013-2018

**Program Value:** \$650,000

**Relevant Tasks:** Title Search, Curative Services,  
Conveyance/ Divestiture of CDBG Property Inventory

### Project Description:

The Louisiana Land Trust (originally formed as the Road Home Corporation, Inc.) was the entity formed by the State of Louisiana to hold title to, and manage, the inventory of properties acquired by the State with CDBG funds in the course of administering the Louisiana Road Home Program in response to Hurricane Katrina in 2005. TCS’s successful performance of work on the Road Home Program naturally led to our involvement with programs created because of the inventory of properties acquired by the Louisiana Land Trust (“LLT”). The primary purpose and scope of this project was to accomplish the transfer of the approximately 1,500 properties.

TCS’s successful delivery of the task required by this project has again proven our ability to deliver large quantities of title work and closings in a very short time. TCS was able to deliver LLT with 200 title commitments every day until their entire inventory was searched and examined. Moreover, there was an intensive title curative work performed in connection with the delivery. It was LLT’s policy to deliver pristine title to each municipality or end use. To implement this policy, TCS cleaned up numerous titles prior to transfer, including cancellations of old mortgages, acts of correction, acts of distinction, quitclaims, successions, etc.

Thereafter, mass conveyance instruments were prepared and title to batches of properties transferred directly to local municipalities. In addition to the direct transfer of title to the mentioned municipalities, TCS worked directly with the municipalities, in certain circumstances, to transfer title directly to end-use builders or homeowners at property inventory auctions. In each instance, the title transferred was covered by an Owners Title Insurance policy issued by TCS



### PROJECT OUTCOMES:

- Delivery of 200 full title search and commitment per day until LLT’s entire CDBG inventory was searched and examined.
- Integration of title curative work into the CDBG program pace and needed speed of project delivery requirements.
- TCS was re-engaged in 2013 for an additional five years, (from 2009) due to the need for extensive title curative services and speed of delivery of title searches.



# TEAM CIVIC SOLUTIONS (TCS) PROJECT EXPERIENCE

## LOUISIANA ROAD HOME PROGRAM

Louisiana Office of Community Development  
2017-2018

**Program Value:** \$30 million

**Relevant Tasks:** Title Search/Ownership, Verification  
Grant Execution/Closing, Services, Escrow & Disbursement  
Services, Buy-Out, Acquisition and Title Insurance Services

### Project Description:

The Louisiana Road Home Program was the CDBG Housing Assistance Program launched by the State of Louisiana to administer and disburse over \$9 Billion in CDBG funds allocated to aid its citizens after the devastation caused by Hurricane Katrina in 2005. TCS experience with the Road Home Program has provided unique knowledge necessary for execution of large scale CDBG housing recovery programs. In the course of executing the scope of work, TCS closed over 60,000 grant transactions and over 4,000 buy-out transactions. This experience has provided a unique advantage in the form of specialized knowledge and lessons learned unique to the type of services necessary to execute large scale CDBG recovery programs. The project required large volumes of closings in short time frames under tremendous pressure, while disbursing billions of dollars and accounting on a regular basis for all funds and timing and type of disbursement. TCS developed relationships with abstractors and other vendors, all of which will be brought to this project in order to establish a seamless start up, efficient execution and thorough finish. TCS successfully performed the scope requirements of The Road Home Program with the following required tasks:

- Develop and build custom and unique information systems necessary to manage and process extremely large amounts of information, and to efficiently use that information in a number of ways including, reporting, document preparation, quality assurances and scheduling of mass closings.
- Manage and train numerous employees in many aspects, including, document preparation, escrow account management, banking and disbursement procedures, call center communications, scheduling, notarial services, title clearance, post-closing procedures, title policy and commitment preparation, and title abstracting.
- Conduct large-scale closings in several different closing locations. This required mass scheduling, crowd management; fast, accurate and thorough document preparation, flexibility to closing table changes and



simultaneous management of a processing center in concert with, and in compliment to, the closing room.

- Create and carry out accurate, error free, but fast escrow account disbursement. TCS has receipted and disbursed up to \$60 Million within a seventy-two (72) hour disbursement deadline imposed by HUD. Disbursements were made pursuant to written instructions received from the homeowners and were done either by check or wire. Recording fees were accounted for and taken into consideration along with payoffs to mortgage holders and the US Small Business Administration. Funds were requested the day after grant closings and seven days prior to all sale closings. Funds were requested in aggregate with supporting detail and then received to escrow in aggregate as well. Once received, funds were de-aggregated into individual escrow accounts and disbursed within 72 hours of receipt.

### PROJECT OUTCOMES:

- 60,000 Grant Transactions Closed
- 4,000+ Buy-Out Transactions Closed & Insured
- 5,000+ abbreviated and full Title Searches Completed
- \$4,000,000,000 in CDBG funds to affected homeowners

# TEAM CIVIC SOLUTIONS (TCS) PROJECT EXPERIENCE

## LOUISIANA ROAD HOME PROGRAM (continued)

Louisiana Office of Community Development

- Implement detailed reporting systems that encompass inventory aging, disbursement status/date, closing date, receipt of funds date, disbursement method, type and detail, funds flow analysis, outstanding check reports, recordation status, title search status, and more.
- Create mass document preparation systems. This required integration of data receiving systems into document preparation software, the creation of custom document forms with appropriate fill-in fields, and integration between HUD-1 document and escrow accounts.
- Implement electronic title work/abstract systems. This included the creation of a separate database for the receipt and entry of all title orders. From this database, title orders were assigned to the numerous abstractors, with whom we have history and a working relationship, via a web based portal. This portal tracked and provided a web based (username and password) link to the abstractors to which they could upload completed abstracts (in .PDF format) to be utilized internally and pushed electronically to the state's eGrants plus project management software. It is important to note that TCS was assigned, and completed, over 55,000 title orders of various types. This has caused TCS to build a vast abstractor network which will be brought to this project as an asset to ensure timely return of all title work necessary.
- Prepare and transmit thousands of title insurance policies, with The Road Home Corporation, Inc., d/b/a the Louisiana Land Trust as the insured. This involved intense Quality Assurance procedures to ensure that all title that closed was closed properly and in an insurable manner. In addition, the QA ensured proper insured, policy amounts, premiums, and that all exceptions noted by the Title Examiners made it into the policy.
- Attend and participate in numerous meetings for the purpose of developing closing procedures to be implemented in connection with the Road Home Program, all of which the client participated. All of the tasks and systems discussed above make TCS uniquely qualified to handle the transactions contemplated by the RFP. TCS has a vast network of abstractors, a proven and existing system for ordering and quickly receiving title work (all in electronic format), extensive escrow services management

and accurate reconciliation experience, effective and accurate document preparation systems, detailed reporting ability, and an extensive network of notaries with experience in handling both individual and mass closings. All of these assets have been created and proven in the context of managing large volumes of data, closings and finances. This large-scale experience and the systems generated as a result, make TCS's team more qualified to handle the tasks set out in the RFP than any other title company in the world.

- TCS provided creation of custom systems allowing the team to capture data one time for use for any task required across TCS's range of scope.
- TCS provided custom calendar development which accommodated mass closings in multiple locations and integrated with and supported the document preparation side of the Grant Closing process.
- Prior to TCS's commencement of work on the project there was only one other company providing the services required under our scope. TCS was brought on to provide increased band width in the title and closing lane.





# TEAM CIVIC SOLUTIONS (TCS) PROJECT EXPERIENCE

## RESTORE LOUISIANA HOUSING RECOVERY PROGRAM MANAGEMENT WITH SOLUTION 4

Louisiana Office of Community Development  
April 2017 – Present

**Program Value:** \$1.8 billion

**Relevant Tasks:** Title Search Services, Closing Services,  
Ownership/Eligibility Issue, Resolution Services

### Project Description:

In response to the devastation caused to the State of Louisiana by what are referred to as the Great Floods of 2016, HUD allocated over \$1.8 Billion dollars to aid the affected citizens to either repair, reconstruct, or be reimbursed for eligible repairs. TCS/Team Title has been involved with the project from program launch and played a material role in; not only carrying out its assigned scope of work, but development of critical program policy and procedure. Our scope of services on the Restore Louisiana Program includes title search, ownership verification, and grant closing services. We anticipate providing all necessary services in connections with that Program's buy-out option when, and if, that Solution is opened by the State. To date, TCS has completed over 16,000 ownership verification title searches and occupancy verification searched of the tax assessor's records, and in all they have closed over 17,000 (aggregated) grant transactions including, rehabilitation, reconstruction (State Managed and Homeowner Managed), reimbursement, and a combination of rehabilitation/ reimbursement grant transactions.

As TCS has evolved and honed its systems due to their vast CDBG project experience, they have used lessons learned to innovate a 100% electronic face-to-face closing systems and process. This system allows for all homeowner signatures to be captured electronically via touch screen monitor. This streamlined process integrates the data exported from the State's system of record into scheduling, document preparation, and post-closing process. Homeowners are immediately delivered an electronic copy of all executed closing documents; the State's system of record is updated with the date of closing and an audit trail is created establishing time and identity of all document signers. TCS's experience with resolving ownership issues for other programs led them to innovate a new and ancillary team as part of the case management team, a specialized team of licensed attorneys review and analyze all legal documents submitted by applicants to establish or challenge the programs' ownership determination. This removed lay



case management staff from the award position of analyzing legal documents in the context of the law and program policy for establishing the ownership prong

of program eligibility; this process was inserted prior to final eligibility determination, reducing ineligibility numbers and the number of appeals filed by Homeowners due to ownership issues. In addition, the ownership issue team put in place would work directly with homeowners to cure any title issues so that they may become eligible pursuant to current program policy.

### Louisiana Restore Homeowner Assistance Program/ Solution 4 Buyout Program

Specific to the Solution 4 Buyout Program, TCS has completed 204 abstract searches (as well as updates) and subsequent title reviews wherein grades were assigned to files based on existing liens, ownership issues, successions needed, and various other factors. The Solution 4 Buyout Program offers two options - a strict buyout wherein the property is transferred wholly to Louisiana Land Trust and a servitude option wherein the applicant retains ownership of the property but there is a perpetual conservation servitude placed onto the property that strictly limits the use of the property.

TCS works directly with applicants to cancel any existing judgments and/or mortgages. Further, TCS has identified what limited legal work is necessary and has worked directly with the program's limited legal provider to determine what the proper probate procedure would be for each specific file.

### PROJECT OUTCOMES:

- 10,000+ grants closing, including repair, reconstruction, reimbursement and MHU replacement transactions
- 16,000+ ownership verification abbreviated title searches completed
- Designed, implemented, and launched 100% paperless closing process

# TEAM CIVIC SOLUTIONS (TCS) PROJECT EXPERIENCE

has conducted 84 closings to date for the Solution 4 Buyout Program- seven of those closings were servitude options. Currently, NORA has 76 properties that were acquired through the Solution 4 Buyout Program. TCS also assisted Louisiana Land Trust in transferring 8 of those properties to local municipalities or adjacent property owners.

## **Isle de Jean Charles**

TCS is prepared to coordinate closings for those individuals participating in the Isle De Jean Charles Resettlement program. Those eligible applicants will be resettling to a new community located in Schriever in Terrebonne Parish about 40 miles north of Isle de Jean Charles. TCS's role will include curative work that needs to be completed for applicants such as canceling existing judgments and/or mortgages against applicants as well as conducting title updates for the resettlement property. Last, TCS will coordinate with applicants to schedule and conduct closings wherein applicants will sign all necessary program documents as well as acquisition documents for their new home in the resettlement community.

## **Pecan Acres to Audubon Estates**

For the Pecan Acres buyout and relocation to Audubon Estates, forty-two title searches and subsequent reviews have already been completed identifying all proper property owners as well as identifying any curative work that needs to be completed. Also, similarly to the Solution 4 Buyout Program, grades were assigned to files based on existing liens, ownership issues, successions needed, and various other factors. TCS works directly with applicants in order to cancel any existing judgments and/or mortgages. Further, TCS has identified what limited legal work is necessary and has worked directly with the program's limited legal provider in order to determine what the proper probate procedure would be for each specific file.

# PLEXOS PROJECT EXPERIENCE

## Past Experience

While Plexos formed in 2012, our team founders and team members are seasoned emergency managers who began their careers dating back to the early 1980's in Louisiana and have been at the forefront of major response and recovery operations for decades. Our senior recovery staff experience includes:

- \$13 billion Community Development Block Grants for Hurricanes Katrina & Rita
- \$12 billion Deepwater Horizon Settlement Program
- \$12 billion Federal Emergency Management Agency (FEMA) Public Assistance
- \$750 million FEMA Funding for Largest Hazard Mitigation Grant Program in U.S. History for Louisiana

### Louisiana GOHSEP Strike Team, 2017-2020

\$2.1 billion

#### FEMA PUBLIC ASSISTANCE PROGRAM

This project supported the State of Louisiana and local parish governments in the closeout of FEMA Public Assistance programs across the state. Plexos partnered with Deloitte to work with parishes identified by GOHSEP as having the greatest difficulty in completing Public Assistance projects and compiling the necessary documentation to justify federal reimbursements and pass audit. The Plexos Team, led by Senior Vice President, Eric Kuntz, successfully closed out more than 1400 projects in the last two years. Eric will serve as Principal Project Manager on this project.

Project Reference: James Waskom, GOHSEP Director, (225) 925-7345

### Louisiana GOHSEP Public Assistance Closeout, 2020-Present

\$3 billion

#### FEMA PUBLIC ASSISTANCE PROGRAM

In 2020, Plexos, again teamed with Deloitte, successfully secured the bid to complete the closeout of public assistance programs for all FEMA PA programs in Louisiana. Currently, our team is supporting GOHSEP and the parishes to complete and close out projects ranging from Hurricanes Katrina, Rita, Gustav, Ike, and Isaac that have caused billions in damage across our communities.

Project Reference: James Waskom, GOHSEP Director, (225) 925-7345

### East Baton Rouge Parish School System, 2016-2017

\$116 million

#### FEMA PUBLIC ASSISTANCE PROGRAM

As a result of the Great Flood of 2016, Plexos assisted CSRS and the EBR Parish School System with FEMA reimbursement operations program management, short and long-term recovery and mitigation efforts.

Project Reference: Tim Barfield, President, CSRS, (225) 769-0060

# PLEXOS PROJECT EXPERIENCE

## **East Baton Rouge City-Parish, 2016-2017**

\$134 million

### **FEMA PUBLIC ASSISTANCE PROGRAM**

Plexos and CSRS were selected to perform Project and Program Management for East Baton Rouge City-Parish. Due to the complexity and wide range of damaged projects, Plexos' primary focus on the recovery efforts pertained to the oversight, planning and execution of all federal funds awarded to the City-Parish, procurement of contractors under the federal award, scope of work and costs per project, risk and stakeholder management, federal and state audit and coordination efforts between the state and FEMA.

Project Reference: Tim Barfield, President, CSRS, (225) 769-0060

## **Florida Division of Emergency Management for Hurricane Irma Recovery, 2018-2020**

\$600 million

### **FEMA PUBLIC ASSISTANCE PROGRAM – GRANT MANAGEMENT ASSISTANCE**

Plexos managed the statewide validation and close out of FEMA PA Grants per the Stafford Act guidelines. The scope of services for this award included project management, comprehensive grant management, technical assistance to applicants, project worksheet approval, monitoring and enforcing compliance with program guidelines, auditing for programmatic and financial compliance with applicable laws, rules, regulations, and policies.

Project Reference: Jill Reyes, Director, RSM, (321) 508-1895

## **Florida Division of Emergency Management for Hurricane Michael Recovery, 2018-2020**

\$187 million

### **FEMA PUBLIC ASSISTANCE PROGRAM – CGRANT MANAGEMENT ASSISTANCE**

Plexos managed the statewide validation and close out of FEMA Public Assistance Grants. The scope of services included performing and tracking all grant management activities, using the appropriate grant management system. As part of the project approval process, our team conducted reviews of projects and assisted with the modification of sitespecific projects.

Project Reference: Jill Reyes, Director, RSM, (321) 508-1895

# PLEXOS PROJECT EXPERIENCE

The table below provides a glance at Plexos' all-encompassing disaster recovery experience for state and local governments, including FEMA Public Assistance, Hazard Mitigation, CDBG Disaster and Mitigation programs.

	FEMA PA	FEMA HMGP	HUD CDBG-DR	HUD CDBG-MIT	OTHER
Galveston County, TX Regional Mit Services, Future Disasters				•	
Galveston County, TX, Hurricane Harvey DR-4332				•	
FDEM Hurricane Michael Recovery DR-4399	•				
FDEM Hurricane Michael Irma DR-4337	•				
NDEM STEP, Hurricane Florence, DR-EM-3401, DR-4393	•				
Texas GLO Hurricane Harvey, DR-4332			•		
SAOEM Texas, Response, Recovery, Mitigation Services	•				
NCEM Hurricane Matthew Recovery DR-4285			•		
USVI HFA Emer Home Repair, Hurricane Irma DR-4335, Hurricane Maria DR-4330	•				
YMCA of Greater Houston, TX, Hurricane Harvey Recovery DR-4332	•	•			
LA GOHSEP Strike Team Closeout Assistance, Multiple EM and DRs	•				
LA OCD-DRU Restore LA Program DRs-4277, 4263			•		
New Jersey RREM, Hurricane Sandy DR-4085			•		
SC Roper St. Francis Healthcare DRs-4286, 4241, 4166		•			
East Baton Rouge LA FEMA Operations DR-4227	•	•			
East Baton Rouge School System LA FEMA Operations DR-4227	•	•			
City of Columbia, SC FEMA and HUD Services, DR-4241	•	•	•		
Sumpter County, SC FEMA Operations, DR-4241	•	•			
Williamsburg County, SC FEMA Operations, DR-4241	•	•			
Williamsburg County, SC Regional Hospital, DRs-4241, 4286	•	•			
Eureka and Valley Park, MO FEMA Operations, DR-4250	•	•			
Tangipahoa Parish LA FEMA Operations, DR-4277	•	•			
NY GOSR Build-it-Back Hurricane Sandy DR-4085			•		
NY GOSR NY Rising Hurricane Sandy DR-4085			•		
NYCHRO Build-it-Back Hurricane Sandy DR-4085			•		
PRDOH R3 Program Hurricane IRMA and Hurricane Maria, DRs-4336, 4339			•		
City College of San Francisco Supplemental Staffing					•
Deepwater Horizon Economic and Prop Damage Settlements, BP Oil Spill					•

# PLEXOS PROJECT EXPERIENCE

## City Revitalization Program, Puerto Rico

**Client:** Puerto Rico Department of Housing



**Hurricane Irma  
(DR-4336)  
Hurricane Maria  
(DR-4339)**

**Period of Performance:**  
2021-present  
**Role:** CDBG-DR Program  
Management Services  
**Program Value:** \$1.3 billion  
**Scope:** Multi-sector program to  
restore and rebuild, leading  
infrastructure and resilience  
efforts across 21 municipalities

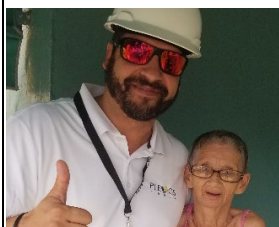
**Services:**  
Plexos is responsible for the following:

- Leading all program tasks-inception to closeout
- Guiding planning and development of restoration and rebuilding projects for key infrastructure in city centers, urban areas, etc.
- Performing intake, application eligibility, damage assessments, inspections, facilitating Tier I and Tier II environmental assessments
- 112 submitted projects for \$281.7M and \$207.8M for 87 approved projects (as of Q1 2022)

**Point of Contact:** Shirley Birriel, Deputy Director, PRDOH, 787-274-2527 ext. 6623, [sbirriel@vivienda.pr.gov](mailto:sbirriel@vivienda.pr.gov)

## Home Repair, Reconstruction, and Relocation (R3) Program, Puerto Caribe, Puerto Rico

**Client:** Puerto Rico Department of Housing



**Hurricane Irma  
(DR-4336)  
Hurricane Maria (DR-  
4339)**

**Period of Performance:**  
2019-present  
**Role:** Program Management and  
Advisory Support  
**Program Value:** \$2.18 billion  
**Scope:** Construction  
Management Services

**Services:**

- Comprehensive case management and damage assessment services
  - Intake to date: 1704
  - Damage assessments: 985
  - Appraisals: 1,328
  - Scoping: 1283
  - Final Assessments: 1064
- URA policy and procedure development

**Point of Contact:** Shirley Birriel, Deputy Director, PRDOH, 787-274-2527 ext. 6623, [sbirriel@vivienda.pr.gov](mailto:sbirriel@vivienda.pr.gov)

## Restore Louisiana (ReLa) Homeowner Assistance Program, State of Louisiana

**Client:** Louisiana Office of Community Development Disaster Recovery Unit



**Great Flood of 2016**


**Period of Performance:**  
2017-2020  
**Role:** Project Management  
Office Support Services  
**Program Value:** \$1.8 billion  
**Scope:** 88% of the State's  
parishes affected, 39,000 homes  
damaged


**Services:**


- Construction Management Oversight to 2500+ housing rehabilitations and 900+ elevations
- 800+ inspections, 1500+ NTPs
- Led Construction Starts 0-100 in 3-week period
- IT Data Management, Analytics and Reporting-tracked 44k applicants and automated 200+ reports
- 3000+ QAQC and environmental reviews
- Close Out, Supplemental Staffing



# PLEXOS PROJECT EXPERIENCE

Build-it-Back Program, New York City, NY		
Client: New York City Housing Recovery Office		
 <p><b>Superstorm Sandy</b></p>	<b>Period of Performance:</b> 2014-2019 <b>Role:</b> Policy Lead, IT/CDBG-DR Reporting, Program Assessment <b>Program Value:</b> \$1.4 billion <b>Scope:</b> 8,300 homeowners served	<b>Services:</b> <ul style="list-style-type: none"> <li>• CDBG-DR Subject Matter Expertise</li> <li>• Program Advisory Support Services</li> <li>• Risk Management</li> <li>• Quality Assurance / Quality Control Plan</li> <li>• Construction Management</li> <li>• Data Analytics and Reporting</li> <li>• Environmental Review/Protocols</li> <li>• Optional Relocation / URA Processes</li> <li>• Developed Change Order Calculator used on 11k+ change orders which reduced error rate from 90% to 3%</li> </ul>

North Carolina FEMA STEP Housing Program		
Client: North Carolina Emergency Management		
 <p><b>Hurricane Florence (DR-4393)</b></p>	<b>Period of Performance:</b> 2018-2020 <b>Role:</b> Program Management and Support Services and Technology Solution <b>Program Value:</b> \$54 million <b>Scope:</b> 12 counties impacted by Hurricane Florence	<b>Services:</b> <ul style="list-style-type: none"> <li>• Program Management and Support Services             <ul style="list-style-type: none"> <li>○ Call Center</li> <li>○ Case Management</li> <li>○ Quality Control</li> <li>○ Field Inspections</li> <li>○ IT Infrastructure and Operations</li> <li>○ PlexoSoft Case Management System, Plexos Reporting Suite, iPlexos, FEMA RAD System</li> <li>○ Project Controls</li> <li>○ Reporting and Business Intelligence</li> <li>○ Staff Augmentation</li> <li>○ Grant Management</li> <li>○ Program Website</li> </ul> </li> </ul>
	<b>Point of Contact:</b> Scott Edelman PE, Senior Vice President, AECOM, Cell: 336-314-3435, <a href="mailto:scott.edelman@aecom">scott.edelman@aecom</a>	

Emergency Home Repairs Virgin Islands (EHVRI) Program		
Client: Virgin Islands Housing Finance Authority		
 <p><b>Hurricane Irma (DR-4335)</b> <b>Hurricane Maria (DR-4340)</b></p>	<b>Period of Performance:</b> 2018-2020 <b>Role:</b> Program Management and Support Services and Technology Solution <b>Program Value:</b> \$250 million <b>Scope:</b> Provided supportive services to St. John, St. Thomas, and St. Croix	<b>Services:</b> <ul style="list-style-type: none"> <li>• Program Management and Support Services             <ul style="list-style-type: none"> <li>○ Call Center / Case Management</li> <li>○ Quality Control</li> <li>○ Field Inspections</li> <li>○ IT Infrastructure and Operations</li> <li>○ Inventory Management</li> <li>○ Project Controls / Reporting</li> <li>○ Staff Augmentation</li> <li>○ Program Website</li> <li>○ Fraud, Waste, and Abuse</li> </ul> </li> </ul>

# PLEXOS PROJECT EXPERIENCE

## COVID-19 Projects (FEMA Public Assistance/CARES Act)

As of July 20, 2022

Since April 2020, Plexos Group, L.L.C. has assisted the COVID-19 applicants listed below in obtaining nearly \$22 million in reimbursements funded through the FEMA Public Assistance program/CARES Act. The reimbursements, resulting from recovery of the COVID-19 pandemic, represent 116 Project Worksheets that covered eligible expenses used in the healthcare industry— including budgeted staff, overtime, and Personal Protective Equipment (PPE) such as masks, coveralls, and sterile gloves. Our clients include non-profit entities with 501c statuses— hospitals, nursing care, and assisted living facilities.

Client/Eligible Applicant	Locations	No. of PWs	Total Approved Reimbursements
Dallas County Hospital District, (Parkland Health and Hospital System)	12 health centers and 11 school-based clinics in Dallas, TX	21	\$9,415,991
Asbury Assisted Living	Asbury, Inc.: Assisted living facilities in Maryville, TN and Kingsport, TN	78	\$9,820,399
	Asbury Atlantic, Inc.: Assisted living facilities in Frederick, MD and Solomons, MD		
	Asbury Atlantic, Inc.: Assisted living facilities in Cumberland, PA		
	Albright Care Services, Inc.: Retirement communities in Lewisburg, PA; York, PA, Williamsport, PA; Lebanon, PA; and Lancaster, PA		
Brooke Grove Foundation, Inc.	Rehabilitation and nursing facilities in Sandy Spring, MD and Williamsport, MD	13	\$1,525,886
Pinnacle Living, Inc. (Virginia United Methodist Homes, Inc.)	Retirement and assisted living facilities in Richmond, VA; Williamsburg, VA; Alexandria, VA; and Roanoke, VA	2	\$1,172,272
Ness Healthcare NFP (Northlake Behavioral Health System)	Full-service behavioral health system with facilities in Mandeville, LA	2	\$45,267
<b>TOTALS</b>		116	\$21,979,815

# PLEXOS PROJECT EXPERIENCE

**State of Louisiana — FEMA Public Assistance Program, Statewide Closeout Assistance**  
**Louisiana Governor’s Office of Homeland Security and Emergency Preparedness**

## PROJECT DESCRIPTION

Through a contractual relationship with Deloitte, Plexos is providing statewide closeout and grant management assistance for Stafford Act Public Assistance programs for all open disasters and includes FEMA Categories A-G. The scope of services includes the implementation and execution of GOHSEP’s strategic plan to meet closeout and grant management metrics as well as to comply with deadlines.

Accomplishments include:

- Closing out 35 project worksheets at approximately \$2.4 million, to date, including hazard mitigation.
- Providing technical assistance, compliance evaluations, closeout assistance, applicant consultation, reimbursement packaging, final experience reconciliation, and training
- Providing subject matter expertise on FEMA closeout procedures.



### CONTRACT VALUE

\$1.3 Million

### CLIENT

Louisiana Governor’s Office of Homeland Security and Emergency Preparedness (GOHSEP)  
 7667 Independence Boulevard  
 Baton Rouge, LA 70806

### PERIOD OF PERFORMANCE

March 2020 – Present

SERVICE	SUCCESSFULLY PROVIDED
Submit federal grant applications, identify eligible projects, capture costs, prepare cost reports, reconcile invoices, and close-out projects.	X
Attend meetings with relevant local, state, and federal officials to address eligibility and process issues.	X
Provide extensive knowledge, experience, and technical competence in dealing with Federal regulations, specifically including the Robert T. Stafford Disaster Relief and Emergency Assistance Act, Post-Katrina Emergency Management Reform Act of 2006, and the Sandy Recovery Improvement Act of 2013.	X
Proactively identify and resolve issues that may arise related to the funding of work completed or to be completed.	X
Obtain, analyze and gather field documentation, including gathering relevant records in order to extract pertinent information necessary for submittal including timekeeping and staff assignment records.	X
Review all data and supporting documentation to determine whether costs appear eligible and are adequately supported.	X
Review Project Worksheets to determine final eligible costs.	X
Reconcile eligible costs and prepare Project Worksheet versions.	X
Perform PW closeouts.	X
General grant management advice.	X
Ensure that invoices submitted are in accordance with the contract, and that all costs eligible for the disaster grant funding are documented and claimed.	X

# PLEXOS PROJECT EXPERIENCE

## State of Louisiana Unemployment Call Center Expansion

Date: April 2020-xx

Program: \$5 million

Client: Louisiana Workforce Commission (LWC)

Reference: J. Robert Wooley, Assistant Secretary, LWC

(225) 342-4633

rwooley@lwc.la.gov

When the state of Louisiana experienced a major spike in unemployment claims associated with the COVID-19 pandemic, the Louisiana Workforce Commission turned to Plexos to help ramp up staffing and resources for its unemployment insurance hotline. Within one week of project award, we rapidly stood up a remote call center to assist Louisiana residents with new unemployment claims and technical assistance with the online claims' portal. At the request of the Louisiana state government, we've hired and trained more than 150 local Louisiana residents to field calls while working remotely from home. In the first 12 months our flexible and scalable solutions have helped more than 400,000 Louisiana residents, with about 1500 calls handled at a 98% answer rate per day.

Plexos staff was attentive and received excellent training from our managers and team leads to keep up with the ever-changing guidelines for COVID-19 pandemic and other Louisiana disasters. Our call center team performance excelled with increased handle times and low abandon rates. Seven months into the project LWC requested 50 of our better call center agents for a team that would specialize in adjudicating claimant's files.





# PWR, LLC PROJECT EXPERIENCE

## **Rebuild Florida Program - Hurricane Irma CDBG-DR - 2019 to 2021:**

PWR, LLC provided construction management services which consisted of the following:

- Training and managing the production of 25 Florida licensed contractors
- Remote training and managing 9 construction project managers on the production of change orders and construction inspections and weekly reporting from assigned contractors
- Developing standard operating procedures for damage assessments, change orders and construction inspections
- Analyzing construction pricing and recommending to the Program new pricing
- Developing policies and procedures for Resilient Home Construction Standards

PWR, LLC designed a construction management database for the processing of change orders and construction inspections. Included in the design was reporting on all construction tasks from notice to proceed through 100% completion. The database also captured lead base paint clearances, elevation certificate calculations, and a catalogue of construction bulletins and other construction training materials that was accessible to Program Contractors and state representatives.

## **Restore Louisiana Program - 2016 Floods CDBG-DR - 2017 to 2020:**

PWR, LLC provided construction management services for the homeowner managed construction portion of the Program, which consisted of managing 18 construction technical advisors that provided the following:

- Award consultations to Applicants to explain construction funding
- Conducted contractor vetting
- Processed funding for mobile home contracts
- Issued notices to proceed
- Processed construction inspections for disbursements
- Reviewed construction drawings and elevation certificates for funding
- Explained construction policies/procedures to Applicants

PWR, LLC designed with the Program's system developers the homeowner managed construction workflow database to ensure accurate and consistent reporting in the Program's system of record.

## **New York Rising Program - Superstorm Sandy CDBG-DR - 2013 to 2017:**

PWR, LLC provided construction management services consisted of the following:

- Training on damage assessments, quality control, change orders and construction inspections
- Developing standard operating procedures
- Preparing feasibility analysis reports
- Conducting elevation analysis based on elevation certificates
- Developing FAQs for call center
- Processing all construction appeals and special needs funding
- Preparing scope of work estimates based on new construction drawings
- Resolved construction issues with constituent services
- Revising scope of work estimates based on State Historical Preservation Office requirements and Lead Base Paint Risk Assessment requirements

# PWR, LLC PROJECT EXPERIENCE

PWR, LLC developed a method for New York Design Professionals to realign Program funding based on construction foundation drawings and the estimating software Xactimate, which enabled the Program to rapidly adjust funding so that Applicants could meet all elevation requirements.

## **Mississippi Neighborhood Home Program - Hurricane Katrina CDBG-DR - 2011 to 2012:**

PWR, LLC provided construction management services consisted of the following:

- Inspecting homes for the development of damage assessments
- Developing additional scopes of work from Lead Base Paint Risk Assessments

PWR, LLC designed a damage assessment process including the development of a template in the estimating software Xactimate that allowed for the highest level of efficiency and consistency in preparation of damage reports. The damage assessment process and template have since been used on numerous CDBG-DR programs.

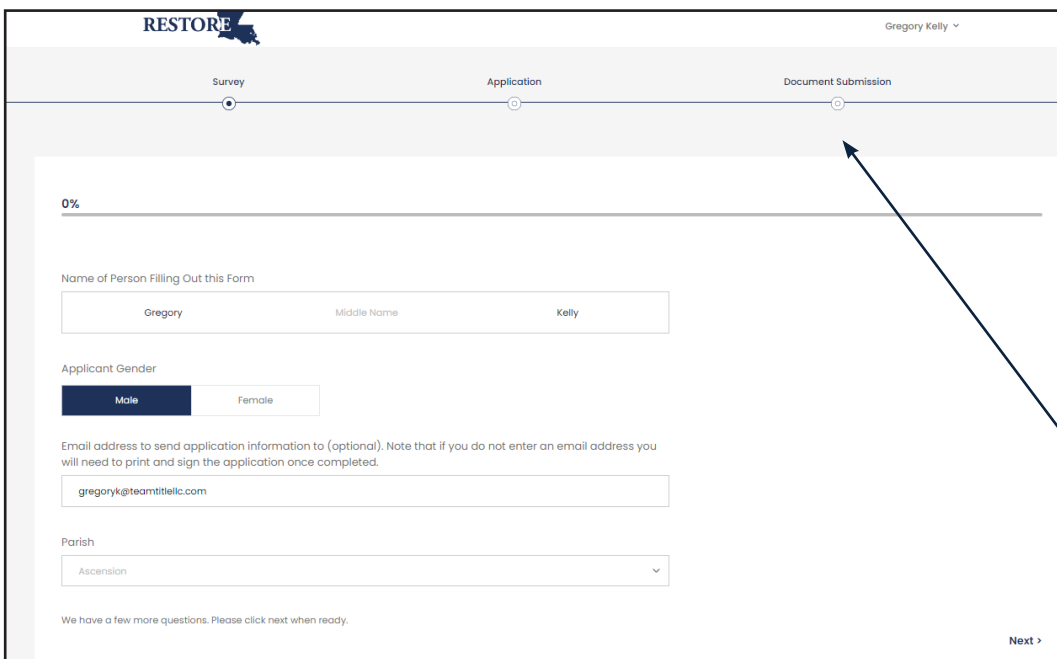
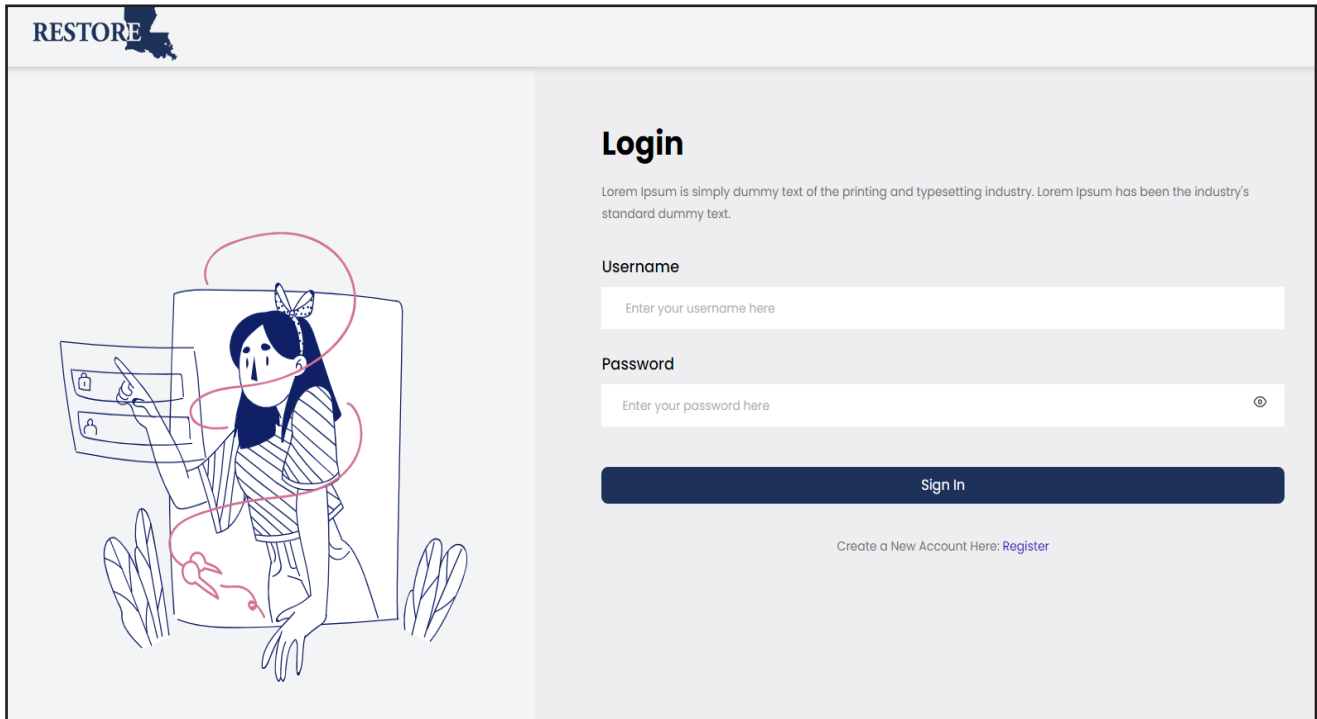


## SECTION E: INNOVATIVE CONCEPTS

# INNOVATIVE CONCEPTS

TCS has the capacity to build custom web applications for our state/municipal clients. The online portal will be built similarly to our current contract with Louisiana Housing Corporation, where we built a custom-designed online application that links directly to the back-of-house database, allows for member login, and document uploads.

This web application will be designed to link directly to the state or program website and include form criteria necessary for applicants to begin the buyout program including document upload capability.

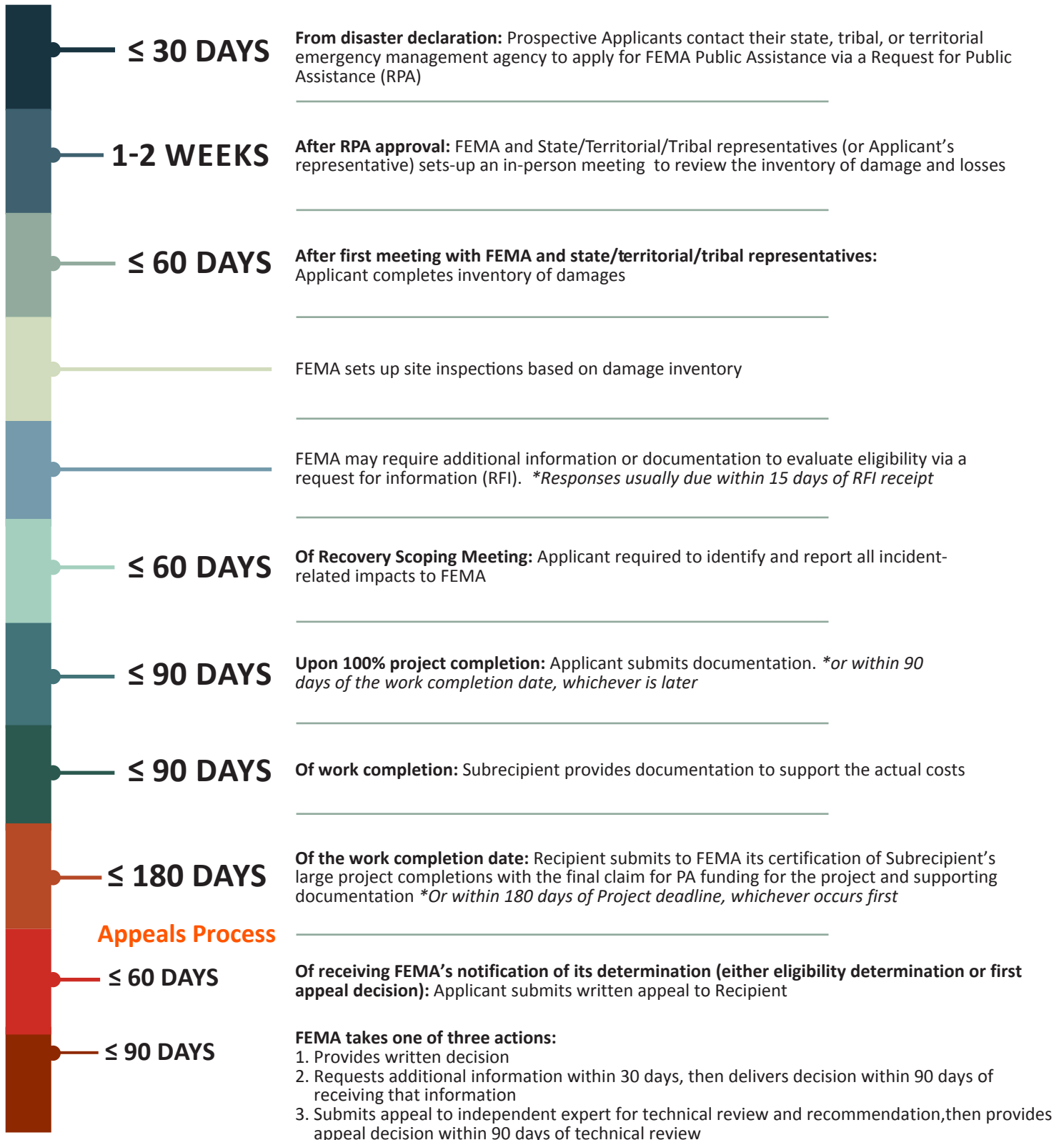


*Example Application Survey built for client demonstration to showcase System of Record.*

*Upload Forms/  
Document Submission capabilities*

## SECTION F: PROJECT SCHEDULE

# FEMA PUBLIC ASSISTANCE APPLICATION TIMELINE



## SAMPLE TIMELINE BY MONTH

Milestone Date (by Month)	Activities/Descriptions
<b>Month 1</b>	<ul style="list-style-type: none"> <li>• Schedule All Hands Meeting for introductions and establish partnerships with the LHC's departments.</li> <li>• Assess the needs of the LHC.</li> <li>• Create and/or review existing project binders for each of the eligible projects.</li> <li>• Gather and review all documentation to date, for presentation to staff, client and compliance review.</li> <li>• Review insurance, procurement, payroll and purchasing policies.</li> <li>• Assess documentation for compliance, additional reimbursement, duplication of benefits, project eligibility.</li> <li>• Obtain a list and any documentation gathered for potential participants.</li> <li>• Schedule meeting with state and federal partners pertaining to contract and objectives.</li> <li>• Ensure all LHC owned facilities with potential damage have been reviewed by the insurance adjuster.</li> <li>• Provide Plexos IT division with data to produce a dashboard.</li> <li>• Establish meeting schedules with officials.</li> <li>• Assess and complete SOW for initial projects.</li> <li>• Set aggressive schedule to close all Category A and B and small projects.</li> <li>• Define the team to ensure the proper skillsets are actively engaged with their counterparts and have specialty positions on stand-by or deployed to meet the needs of the mission.</li> </ul>
<b>Month 2 - 4</b>	<ul style="list-style-type: none"> <li>• Minimum of 30% Category A and B projects submitted for closeout.</li> <li>• Minimum of 30% small projects submitted for closeout and prepare for 20% inspection of these projects.</li> <li>• Consult with FDEM and FEMA on projects facing funding issues.</li> <li>• Adjust staffing needs based on mission and Task Orders, with LHC approval.</li> <li>• Provide the LHC with list of all outstanding documentation needed to begin scope of work development and project worksheet entry to EMMIE.</li> <li>• Provide the LHC with status of current PW's and list of additional potentially eligible projects.</li> <li>• Coordinate with the LHC leadership on development of a long-term plan for Category E work.</li> <li>• Identify Alternate and Improved Projects.</li> <li>• Coordinate with the LHC on 406 Hazard Mitigation projects.</li> <li>• Begin compiling projects for 404 Hazard Mitigation requests to FDEM.</li> <li>• Develop additional version to Category B – Emergency Protective Measures (as needed).</li> <li>• Internal engineer review of all estimates for Category C and Category E.</li> <li>• Coordinate with the LHC on RFP's that need to let for bid.</li> </ul>

Milestone Date (by Month)	Activities/Descriptions
	<ul style="list-style-type: none"> <li>Complete version requests on projects that require scope of work changes.</li> </ul>
<b>Month 4 - 5</b>	<ul style="list-style-type: none"> <li>Have all eligible projects initial submission readied for compliance review.</li> <li>Minimum of 30% Category A and B projects submitted for closeout.</li> <li>Minimum of 30% small projects submitted for closeout and prepare for 20% inspection on these projects.</li> <li>Submit requests for Alternate and Improved Projects to FDEM and FEMA.</li> <li>Coordinate with LHC on RFP's that need to let for bid.</li> <li>Complete version requests on projects that require scope of work changes.</li> </ul>
<b>Month 6 - 8</b>	<ul style="list-style-type: none"> <li>Maintain compliance for long term Category C-G projects.</li> <li>Close remaining Category A and B projects.</li> <li>Close remaining small projects.</li> <li>Begin preparing for internal, state and federal audits, unless previously scheduled.</li> <li>Coordinate with LHC on RFP's that need to let for bid.</li> <li>Complete version requests on projects that require scope of work changes.</li> </ul>
<b>Month 8 - 12</b>	<ul style="list-style-type: none"> <li>Address project issues with FDEM and FEMA on the progress of long-term Category E projects.</li> <li>Address issues slowing down progress of Category A and B projects as well as any small projects that have not been obligated.</li> <li>Complete necessary reports due to FDEM and FEMA.</li> <li>Coordinate with Estero on remaining RFP's that need to let for bid.</li> <li>Complete version requests on projects that require scope of work changes.</li> <li>Make closeout preparations on all remaining projects.</li> </ul>

**\*\*Disclaimer:** Timeline may vary once all projects have been assessed and complexity has been determined.



## SECTION G: FINANCIAL PROPOSAL

Please see separate document for CONFIDENTIAL company financials.

## SECTION G: COST PROPOSAL

Please see separate document for Cost Proposal Attachment B.

## ATTACHMENTS



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

08/26/2022

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

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

<b>PRODUCER</b> Automatic Data Processing Insurance Agency, Inc.  1 Adp Boulevard Roseland NJ 07068		<b>CONTACT NAME:</b> Automatic Data Processing Insurance Agency, Inc. <b>PHONE (A/C, No, Ext):</b> 1-800-524-7024 <b>FAX (A/C, No):</b> <b>E-MAIL ADDRESS:</b>																						
<b>INSURED</b> Team Title, LLC  69090 Highway 190 Service Rd Ste 200 Covington LA 70433		<table border="1"> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A :</td> <td>Travelers Casualty and Surety Company</td> <td>19038</td> </tr> <tr> <td>INSURER B :</td> <td></td> <td></td> </tr> <tr> <td>INSURER C :</td> <td></td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> <td></td> </tr> </table>		INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A :	Travelers Casualty and Surety Company	19038	INSURER B :			INSURER C :			INSURER D :			INSURER E :			INSURER F :		
INSURER(S) AFFORDING COVERAGE		NAIC #																						
INSURER A :	Travelers Casualty and Surety Company	19038																						
INSURER B :																								
INSURER C :																								
INSURER D :																								
INSURER E :																								
INSURER F :																								

## COVERAGES

**CERTIFICATE NUMBER:** 2605806

**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	
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$	
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$	
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$	
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N N	N / A	N	UB-8M496235-22-42	03/01/2022	03/01/2023	<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

## CANCELLATION

Jefferson Parish, Attn: Department of Administration  
 1221 Elmwood Park Blvd. #1002

Harahan

LA 70123

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

*Handwritten signature*

© 1988-2015 ACORD CORPORATION. All rights reserved.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/27/2022

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

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

<b>PRODUCER</b> Cadence Insurance (formerly BXS Insurance) 4041 Essen Lane, Suite 400 Baton Rouge LA 70809		<b>CONTACT NAME:</b> Angela Oubre, CIC, CRM, CISR <b>PHONE (A/C, No, Ext):</b> 225-336-3200 <b>FAX (A/C, No):</b> 225-336-4536 <b>E-MAIL ADDRESS:</b> angela.oubre@cadenceinsurance.com	
		<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>
		<b>INSURER A :</b> Federal Insurance Company	20281
<b>INSURED</b> Plexos Group, LLC 1800 City Farm Dr, Ste B, Bldg 4 Baton Rouge LA 70806		<b>INSURER B :</b> Accident Fund Ins Co of America	10166
		<b>INSURER C :</b>	
		<b>INSURER D :</b>	
		<b>INSURER E :</b>	
		<b>INSURER F :</b>	

## COVERAGES

CERTIFICATE NUMBER: 805796195

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 SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <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 type="checkbox"/> LOC OTHER:	Y	36061970WCE	9/27/2022	9/27/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 1,000,000 \$
A	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		99507371	9/27/2022	9/27/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$		78191502	9/27/2022	9/27/2023	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	WCP100072588	8/28/2022	8/28/2023	<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
A	Professional Liability		82502597	8/28/2022	9/27/2023	Per Claim Aggregate 2,000,000 2,000,000

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

## CERTIFICATE HOLDER

## CANCELLATION

For Information Purposes

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

*Edwin Jenkins*

© 1988-2015 ACORD CORPORATION. All rights reserved.





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/13/2022

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

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

<b>PRODUCER</b> Brad Burns Insurance 2108 Delta Way  Tallahassee FL 32303	<b>CONTACT NAME:</b> Keith Meyer <b>PHONE (A/C, No, Ext):</b> (850) 385-6500 <b>FAX (A/C, No):</b> (850) 385-0810 <b>E-MAIL ADDRESS:</b> info@BradBurnsIns.com														
<b>INSURED</b> PWR LLC 757 SE 17th St Ste 180 Ft Lauderdale FL 33316	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> <tr> <td><b>INSURER A:</b> Hartford Underwriters Ins Co</td> <td>30104</td> </tr> <tr> <td><b>INSURER B:</b> Hartford Cas Ins Co</td> <td>29424</td> </tr> <tr> <td><b>INSURER C:</b> Hiscox Insurance Co Inc</td> <td></td> </tr> <tr> <td><b>INSURER D:</b></td> <td></td> </tr> <tr> <td><b>INSURER E:</b></td> <td></td> </tr> <tr> <td><b>INSURER F:</b></td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	<b>INSURER A:</b> Hartford Underwriters Ins Co	30104	<b>INSURER B:</b> Hartford Cas Ins Co	29424	<b>INSURER C:</b> Hiscox Insurance Co Inc		<b>INSURER D:</b>		<b>INSURER E:</b>		<b>INSURER F:</b>	
INSURER(S) AFFORDING COVERAGE	NAIC #														
<b>INSURER A:</b> Hartford Underwriters Ins Co	30104														
<b>INSURER B:</b> Hartford Cas Ins Co	29424														
<b>INSURER C:</b> Hiscox Insurance Co Inc															
<b>INSURER D:</b>															
<b>INSURER E:</b>															
<b>INSURER F:</b>															

**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"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			21SBMAL9P4Z	06/17/2022	06/17/2023	EACH OCCURRENCE \$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000
							MED EXP (Any one person) \$ 10,000
							PERSONAL & ADV INJURY \$ 1,000,000
	<b>AUTOMOBILE LIABILITY</b>						GENERAL AGGREGATE \$ 2,000,000
	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						PRODUCTS - COMP/OP AGG \$ 2,000,000
	<b>UMBRELLA LIAB</b>						COMBINED SINGLE LIMIT (Ea accident) \$
	<b>EXCESS LIAB</b>						BODILY INJURY (Per person) \$
	DED RETENTION \$						BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>			21WECAL9P6P	05/28/2022	05/28/2023	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N	N/A				<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT \$ 100,000
							E.L. DISEASE - EA EMPLOYEE \$ 100,000
A	Professional Liability			MPL5241967.22	10/12/2022	10/12/2023	E.L. DISEASE - POLICY LIMIT \$ 500,000
							Each Claim \$1,000,000 Aggregate \$1,000,000

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

**CERTIFICATE HOLDER**
**CANCELLATION**

PWR LLC 757 SE 17th St Ste 180 Ft Lauderdale FL 33316	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
--	---

© 1988-2015 ACORD CORPORATION. All rights reserved.

# STATEMENTS

## INDEMNIFICATION

TCS agrees to indemnify and hold harmless the Parish of Jefferson, its departments, agencies, boards and commissions, officers, agents, servants and employees, including volunteers, against any and all claims, demands, suits, costs, liabilities or judgments for sums of money, and fines or penalties asserted by any party, firm or organization for loss of life or injury or damages to person or property, growing out of, resulting from, or by reason of any negligent acts, errors, and/or omissions by TCS, its agents, servants or employees, while engaged upon or in connection with the services required to be performed by Proposer under this RFP.

Further, TCS shall agree to indemnify the Parish of Jefferson, its departments, agencies, boards and commissions, officers, agents, servants and employees, including volunteers for all reasonable expenses and attorney's fees incurred by or imposed in connection therewith for any loss, damage, injury or other casualty pursuant to this RFP. TCS additionally shall agree to pay all reasonable expenses and attorney's fees incurred by the Parish of Jefferson, its departments, agencies, boards and commissions, officers, agents, servants and employees, including volunteers in establishing the right to indemnity pursuant to the provisions stated herein.

## EEOC and ADA COMPLIANCE

TCS 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 Assistant Act of 1974, Title IX of the Education Amendments of 1972, the Age Discrimination in Employment Act of 1972, and the Contracting Party agrees to abide by the requirements of the American with Disabilities Act of 1990.

TCS shall keep informed of and comply with all federal, state and local laws, ordinances and regulations which affect his employees or prospective employees. Any act of discrimination committed by the Proposer, or failure to comply with these statutory obligations, when applicable, shall be grounds for termination of the contract.

## AUDIT OF RECORDS

A. TCS affirmatively acknowledges and agrees that pursuant to any ensuring contract, TCS shall maintain adequate books of account with respect to its services, in accordance with generally accepted accounting principles (GAAP) in a form and method acceptable to the Parish. TCS shall permit Parish and Parish's agents from time-to-time within forty-eight (48) hours written notice, to inspect, copy and audit during TCS's normal business office hours, the books and records pertaining to the services provided under the contract. Parish's right to audit, inspect, and make copies of TCS's records shall be at the sole expense of Parish.

B. Periodic and/or Annual Reports. At any time, the Parish may request that TCS with the minimum of thirty (30) days written notice, prepare and/or produce a report of the results of operations, as it pertains to any ensuring contract, in the previous fiscal year prepared in accordance with generally accepted accounting principles (GAAP). The report must be prepared and certified by an independent certified public accounting firm. (For purposes of said contract, each "fiscal year" begins on January 1 and ends on December 31 of the same year.)

# STATEMENTS

---

## **RECORD RETENTION**

TCS agrees that it shall maintain all records in relation to the proposed contract at its location for a period of at least three (3) years past the final state closeout of each disaster or any other period stipulated by the governing State and Federal regulations, whichever is longer.

## **RECORD OWNERSHIP**

TCS acknowledges and agrees that all records, reports, documents, or other material(s) developed or resulting from this RFP shall be the sole property of the Parish of Jefferson, and shall be returned to the Parish by Proposer upon request at expiration or earlier termination of a contract.

Anti-Lobbying Form

**CERTIFICATION OF RESTRICTIONS ON LOBBYING**

I, Kevin Pond, Chief Commercial Officer, hereby certify on  
(name and title of bidder's official)

behalf of Team Civic Solutions 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 14 day of October, 2022.

By \_\_\_\_\_  
(signature of authorized official)

Chief Commercial Officer  
(title of authorized official)

  
\_\_\_\_\_  
Signature of Authorized official

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](http://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.

Kevin Pond, Chief Commercial Officer

\_\_\_\_\_  
(Name and Title of bidder's official)

Kevin Pond, Chief Commercial Officer

\_\_\_\_\_  
(Name of bidder/company)

69090 Hwy 190 Service Rd, Ste 200

\_\_\_\_\_  
(Address)

Covington, LA 70433

\_\_\_\_\_  
(Address)

PHONE 985-327-7227 FAX \_\_\_\_\_

EMAIL kpond@teamcivicsolutions.com \_\_\_\_\_



Signature 10/13/22 \_\_\_\_\_ Date



## Request for Proposals #0448

### To Provide Consulting Services for Disaster Recovery and FEMA Public Assistance

#### SIGNATURE PAGE

The Jefferson Parish Department of Purchasing is soliciting Request for Proposals (RFP'S) from qualified proposers who are interested in providing Consulting Services for Disaster Recovery and FEMA Public Assistance for the for the Jefferson Parish Public Safety Grants & 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: Team Civic Solutions

Address: 69090 Hwy 190 Service Rd, Ste 200  
Covington, LA 70433

Phone Number: 985-327-7227 Fax Number \_\_\_\_\_

Type Name of Person Authorized to Sign: Kevin Pond

Title of Person Authorized to Sign: Chief Commercial Officer

Signature of Person Authorized to Sign: 

Email Address of Person Authorized to Sign: kpond@teamcivicsolutions.com

Date: 10/14/22

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.

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:

**List of Subcontractors: Plexos Group and PWR, LLC**

Subcontractor Disclosures

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

Choice A X

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 \_\_\_\_\_

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



Signature of Affiant

Kevin Pond, Chief Commercial Officer

Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME

ON THE 12<sup>th</sup> DAY OF October, 2022.

  
Notary Public

Traci L. Cogle  
Printed Name of Notary

147605  
Notary/Bar Roll Number

My commission expires FOR LIFE

