



## Volume 1: Technical Proposal

### Deloitte Response to the Jefferson Parish Government's

REQUEST FOR PROPOSALS FOR GRANT CONSULTING SERVICES IN CONNECTION WITH AMERICAN RESCUE PLAN ACT OF 2021 AND OTHER LOCAL, STATE, FEDERAL AND PRIVATE GRANT OPPORTUNITIES (RFP-0447)

**October 14, 2022**

**Confidential Cover Sheet and RFP Criteria Matrix**

**THIS DOCUMENT CONTAINS CONFIDENTIAL PROPRIETARY OR TRADE SECRET INFORMATION**

The data contained in pages of the offer **that are listed in the table below** have been submitted in confidence and contain trade secrets or privileged or confidential information. Such data shall only be disclosed for evaluation purposes, provided that if a contract is awarded to this Offeror as a result of or in connection with the submission of this offer, the Jefferson Parish Government shall have the right to use or disclose the data therein to the extent provided in the contract. This restriction does not limit Jefferson Parish's right to use or disclose data obtained from any source, including the Offeror, without restrictions.

<b>Tab/Section Title</b>	<b>Confidential Information, Trade Secrets and Proprietary Information – Page Numbers</b>	<b>Brief Description of Content</b>
Cover Letter	Pages 2-3	Approach, References, and Personnel Information
Technical Approach	Pages 6-22	Proprietary References, Approach, and Personnel Information
Proposer Qualifications	Pages 23-42	Proprietary Methodology and Approach
Innovative Concepts	Page 43	Proprietary Technology
Project Schedule	Page 44	Proprietary Methodology and Approach
Addendums A, B, and C	Pages 47-78	Personnel and Insurance Information

The matrix below demonstrates all material elements requested in the RFP have been included in Deloitte’s response.

<b>Per RFP: Items must be included in Narrative</b>	<b>Corresponding Page in Bidders Response</b>
<b>Scope of Services (15 Points)</b>	
<i>Firm must have a minimum of 5 years’ experience in providing the Scope of Services outlined in this Request for Proposal.</i>	p. 6-22
<b>Project Schedule (15 Points)</b>	
<i>Detailed schedule of implementation plan for pilot (if applicable) and full implementation. This schedule is to include implementation actions, timelines, responsible parties, etc.</i>	p. 44
<b>Specific Experience – 3 equal or larger scope of work/services are either currently being provided or provided in the past two (2) years (20 points)</b>	
<i>Proposers must provide a minimum of three (3) references (governmental and/or private), for whom equal or larger scope of services are either currently being provided or have been provided in recent past (department to define recent past but not to exceed past two years). Contact person(s), addresses and telephone numbers for each reference shall be included.</i>	p. 38-42
<b>Personnel – experience of management staff, experience in similar projects, etc. (15 points)</b>	
<i>Possess extensive knowledge of federal and state requirements and guidelines including, but not limited to Treasury policy, Uniform Guidance, and other associated grant policy guidance. Possess extensive knowledge of federal and state reimbursement policies and procedures. Possess extensive knowledge of federal and state close-out procedures.</i>	p. 32-37 p. 47-70
<b>Responsiveness to the RFP (5 points)</b>	
<i>Proposal Receipt Date is 10/14/2022 at 3:30 P.M.</i>	
<b>Financial Profile of Company (5 points)</b>	
<i>Submit documentation from the past three (3) years demonstrating proposer’s financial stability. Documentation may include audited financial statements including balance sheets, income statements, documentation regarding retained earnings, assets, liabilities, etc.</i>	p. 46
<b>Cost Proposal (25 points)</b>	
<i>The proposer with the lowest price shall receive the highest cost evaluation. Other proposers will receive a cost score computed as follows <math>CS=(LPC/PC*X)</math></i>	Separate Attachment

# A. Cover Letter

The below section contains the following information and disclosures to aid the evaluator in their understanding of the response and tie the requirements set forth in the RFP to the sections of this response:

- **Evidence of the Authority of the Person Signing:** Provided to meet the requirement of section 1.7 Proposal Response Format, A. Cover Letter on page 7 of the RFP which states "satisfactory evidence of the authority of the person signing for the agency, corporation, partnership or other legal entity shall be attached to the proposal"
- **Disclaimers and Conditions**
- **Official Cover Letter:** Provided to meet the requirement of section 1.7 Proposal Response Format, A. Cover Letter on page 7 of the RFP including
  - Containing summary of proposer's ability to perform the services described in the RFP and confirms that proposer is willing to perform those services and negotiate a contract with the Parish
  - The letter shall be signed by a person having authority to negotiate and to commit the proposer to a contract
  - Proposers should exhibit their understanding and approach to the project and address how each element will be accomplished.

## Evidence of the Authority of the Person Signing

# Deloitte.

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USA

Tel: +1 504 581 2727  
[www.deloitte.com](http://www.deloitte.com)

October 14, 2022

Nicolle Whitney  
Jefferson Parish Government  
Phone: (504) 364-2649  
Email: [nwhitney@jeffparish.net](mailto:nwhitney@jeffparish.net)

Dear Ms. Whitney,

On behalf of Deloitte & Touche LLP, we are pleased to respond to the Jefferson Parish Government's Request for Proposal for Grant Consulting Services in Connection with American Rescue Plan Act of 2021 and Other Local, State, Federal and Private Grant Opportunities.

The Deloitte & Touche LLP Partnership Agreement (Memorandum of Agreement) provides each partner of Deloitte & Touche LLP the authority to bind the Firm. As Office Managing Partner for Deloitte's New Orleans office, I affirm that Ragini Roy Basu is a principal in good standing with the firm and has the authority to act on behalf of the firm in all negotiations, bidding, concerns, and transactions with the Jefferson Parish Government or any of its agencies, departments, employees, or agents, including but not limited to, the execution of all proposals, papers, documents, affidavits, bonds, sureties, contracts and ACTS and to receive all purchase orders and notices issued pursuant to the provisions of any such proposal or contract.

If you need additional information or have any questions, please feel free to reach out to either Ragini Roy Basu at +1 713-982-2949/ [rrbasu@deloitte.com](mailto:rrbasu@deloitte.com) or myself at +1 504-561-7291 or [pbrandau@DELOITTE.com](mailto:pbrandau@DELOITTE.com)

Sincerely,



Patrick J. Brandau,  
New Orleans Office Managing Partner

## Disclaimers and Conditions

As used in this document, "Deloitte" or "Deloitte Risk and Financial Advisory" refers to Deloitte & Touche LLP and its affiliates; Deloitte Financial Advisory Services LLP (including its subsidiary, Deloitte Transactions and Business Analytics LLP), and Deloitte Consulting LLP. Deloitte & Touche LLP shall be responsible for the services and its affiliates may provide additional resources. These entities are separate subsidiaries of Deloitte LLP. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of Deloitte LLP and its subsidiaries. The services will be performed in accordance with the Statement on Standards for Consulting Services issued by the American Institute of Certified Public Accountants (the "AICPA"). However, the performance of the services will not constitute an engagement to provide audit, compilation, review, or attest services as described in the pronouncements on professional standards issued by the AICPA or the U.S. Public Company Accounting Oversight Board and, therefore, Deloitte will not express an opinion or any other form of assurance with respect to any matters (including, without limitation, compliance with U.S. GAAP, IFRS and SEC rules and regulations).

Our proposal is being made subject to the condition Deloitte & Touche LLP ("Deloitte") and Jefferson Parish Government ("Parish") subsequently reach and enter into a mutually acceptable definitive written agreement for the proposed services. Our experience has indicated almost without exception we have been able to reach agreement with each of our clients who have awarded us an engagement, including many engagements with public sector clients. We are confident our experience with the Parish will be no different in this case. We believe the basis for this success lies in the benefit of the negotiation process which allows each party to understand the other's reasonable concerns. Therefore, if we are awarded this engagement, please trust Deloitte is open and ready to promptly negotiate mutually agreeable terms with the State in a collaborative and expeditious manner.

Dear Members of the Evaluation Committee,

The Deloitte Team has worked extensively in the State of Louisiana for over two decades assisting numerous agencies, parishes, cities, and municipalities in their management of sizeable federal grant awards. Our proposed team has also directly supported Jefferson Parish through the Governor's Office of Homeland Security with the management and closure of many of your Public Assistance disaster grants. With our grant professionals now turning their attention to the enable the success of our Louisiana clients in navigating the American Rescue Plan, the Bi-partisan infrastructure law, and the newly passed Inflation Reduction Act, we have significant knowledge and experience of the challenges present with navigating these programs and **are personally invested and committed** in bringing our lessons learned and points of view to contribute the success of Jefferson Parish in this important endeavor. We are **able and willing to perform the services outlined in the scope of work** and look forward to negotiating a contract with the Parish based on our response to the Parish's Request for Proposals for Grant Consulting Services in Connection with American Rescue Plan Act of 2021 and Other Local, State, Federal and Private Grant Opportunities.

As stated above, Deloitte is no stranger to Jefferson Parish as we have been working directly with your team for the last five years to manage and close over \$129M worth of funding across 18 grant files, resulting in the closure of nearly all grants for Hurricanes Isaac and Katrina. We are also serving many individual entities within the Parish including the City of Kenner, City of Gretna, City of Harahan, Jefferson Parish Sheriff's Office, and Jefferson Parish Public School System with grant formulation, administration, and closeout.

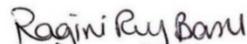
We understand Jefferson Parish has received \$84M in funding through the American Rescue Plan Act (ARPA). This amount of funding requires a strategy, a clear set of priorities, and a plan to allocate funds in a way that is equitable for your constituents, efficient in its implementation given a 2026 deadline, and compliant with Treasury guidance. We have carefully reviewed your scope of work and crafted a response that delivers the lessons we have learned from administering the very grant programs you are targeting including the American Rescue Plan Act, the Infrastructure Investment and Jobs Act, CDBG-DR, and more across not only Louisiana, but the United States. **We understand the priorities that have been established by Jefferson Parish including focus areas of Public Health, Water and Sewer Infrastructure, Revenue Replacement, and other competitive investments that are currently being targeted for funding with these dollars according to your Recovery Plan Performance Report.**

With the volume and velocity of funding made available through recent legislation, many organizations consider federal program administration, compliance, and quality control services to be a necessary commodity. At Deloitte, we see this funding as an obligation embedded with **value** and **opportunity**. With that objective our proposal outlines:

- Deloitte's **American Rescue Plan Resource Center** that shares interpretation on emerging regulations, related guidance, and includes customized toolkits, workpapers, and templates that can be modified for use in your grant administration programs.
- Our **Infrastructure Investment and Jobs Act (IIJA) Center of Excellence** which will provide up to date guidance and interpretation of policies to provide an edge to the delivery team in **competitive grant writing and administration**
- Our **Funding Inventory Tool (FIT)** - A proprietary technology that acts as a centralized research platform which enables our team to assist with aligning projects to grant opportunities and quickly identifying requirements and regulations
- Our experience **managing federal grants and the requirements of 2 CFR 200 over the past 3 decades** through our end-to-end grant management methodology which includes developing funding strategy, compliance checks, and completeness reviews.
- Our commitment to **servicing the State of Louisiana** through our prior and current engagements over the past 15 years
- Our ability to provide **depth and support with over 200 staffing resources** in our New Orleans and Baton Rouge offices
- Our direct experience providing the services requested in this RFP to other Parishes in the State and supporting them through the **identification** of projects, the vetting of **eligibility** and appropriate expenditure categories, and the **oversight** of construction for those projects related to infrastructure investment

Our comprehension of your needs and thorough understanding of the scope of work through our experience delivering the requested services to comparable municipalities such as the Lafayette Parish Consolidated Government, amongst others nationwide, are demonstrated throughout our work plan, approach, and timeline. Our goal, in the pages that follow, is to share our passion for serving clients and how our experience translates into providing support to your grant administration with confidence and peace of mind.

Sincerely,



Ragini Roy Basu  
Principal, Deloitte & Touche LLP

# The **Deloitte.**Team

# \$50 Billion

IN DISASTER RELATED GRANT FUNDING MANAGED SINCE 2005

COVID RELIEF PROGRAM SUPPORT FOR

# 50+

STATES AND LOCAL GOVTS.



## 400+ Certified Staff



CERTIFIED PUBLIC ACCOUNTANTS



GRANT MANAGEMENT PROFESSIONALS



FORMER WHITEHOUSE POLICY ADVISORS

## Louisiana + ARPA Experience



Proprietary ARPA Funding Inventory Tool – 100 Users Included!  
Includes available funding streams, eligible costs, reporting requirements



Worked intimately with over 100 subrecipients across Louisiana by providing over 15 years of Federal assistance program support, yielding over \$19 billion in Federal grant expenditures



Established an American Rescue Plan Resource Center to provide up-to-date guidance and interpretation of new policies from Treasury to help entities across Louisiana effectively manage ARPA guidelines

### **DID YOU KNOW?**

Deloitte is currently delivering your requested scope of work to Lafayette Consolidated Government.

## B. Table of Contents

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# C. Technical Proposal

*Illustrating and describing compliance with the RFP requirements defined in the Scope of Work/Services (Part II) and Proposer Qualifications. This section meets the requirements of section 2.7 Proposal Elements, A and section 2.1. Technical on pages 19 & 21 of the RFP which states:*

- *Each proposer shall submit their experience in working with applicants to pursue grant funding opportunities. Proposer shall include the amount of firm experience performing the noted scope of work/services, including comprehensive explanation of grant writing, scoping, formulation, and reporting and unique methods used in the process of obtaining successful awards.*
- *Plans and/or schedule of assessments to implement pursuit of funding opportunities*
- *Plans for advisory and management services for the American Rescue Plan Act funding, including reporting, guidance, technical advisory, and eligibility determinations*
- *Plans for needs analysis reporting to assess funding opportunities for Parish infrastructure projects*
- *Proposer shall submit an affirmative statement that the proposer has reviewed the scope of work, understands the nature thereof and is willing and capable of providing the services thereof*

## Our Understanding of Your Needs

We understand that Jefferson Parish is seeking an experienced team able to provide full lifecycle support for the administration of **ARPA, IJIA, CARES Act** and other federal grants. Having delivered similar services to other Parishes of similar size in Louisiana, our team has developed a broad understanding of the requirements of these bills and the tactical steps that need to be taken to successfully scope and deliver projects within the grant period of performance. To demonstrate our specific understanding of these bills, we have reviewed Jefferson Parish’s ARPA strategy through the Parish Council’s announced projects from May 2022 and selected a sample of these projects to provide our perspective on considerations that should be addressed to be in compliance with ARPA requirements which are to:

1. **Respond to COVID-19 and its negative economic impacts,**
2. **Provide premium pay to essential workers,**
3. **For the provision of government services to the extent of the reduction in revenue due to COVID-19**
4. **To make investments in water, sewer, and other infrastructure**

As potential projects are identified, it is important to understand the logistics and detailed scope to ensure that the project is appropriately aligned under Treasury guidance. Our team is prepared to aggregate and organize project requests and reconcile them against Treasury guidelines issued by the federal government to assist Jefferson Parish in demonstrating compliance with the intent of the funding.

On the following table, we have specifically identified a number of proposed projects from the Jefferson Parish ARPA report and provided some considerations which our team can help build out to demonstrate compliance with ARPA requirements.

Jefferson Parish Priority Projects	ARPA Guidance and Analysis of Eligibility
<b>District 1:</b> - Increased Coastal protection and Recovery efforts. - Drainage and Infrastructure hardening.	The Treasury has expanded the eligible usage of funds to include <b>stormwater system infrastructure projects</b> , regardless of any water quality benefit from the projects.
<b>District 2:</b> - Modernization of Aging Infrastructure for Economic development.	Recipients may use funds <b>for maintenance of infrastructure</b> or pay-go spending for the <b>building of new infrastructure</b> as part of the general provision of government services, to the extent of the estimated reduction in revenue due to the public health emergency
<b>District 3:</b> - District wide improvement to street, drainage, and Sewerage infrastructure.	Governments will have wide latitude to identify investments in <b>water and sewer infrastructure</b> that are of the highest priority for their own communities, which may include projects on privately-owned infrastructure.
<b>District 4:</b> - Parish Land Acquisition efforts. - Façade improvement program around Lafreniere Park.	Certain services for <b>vacant or abandoned properties</b> are eligible to address the public health and negative economic impacts of the pandemic on disproportionately impacted households or communities.
<b>District 5:</b> - Construction of multipurpose green space, transportation hub and parking structure.	The Treasury encourages recipients to consider <b>green infrastructure</b> investments and projects to improve resilience to the effects of climate change.

Based on our team’s extensive experience working with local municipalities, we understand the challenges of meeting the programmatic goals and reporting timelines set forth in the ARPA and recognize that Jefferson Parish needs a vendor that can help your team achieve the following objectives:

- **Identify and win competitive grant opportunities** by articulating compelling stories for investment in Jefferson Parish
- Ensure State and Local Fiscal Recovery Funds (SLFRF) funds are fully obligated prior to the upcoming **December 31, 2024**, deadline imposed by Treasury
- Differentiate between contractors, beneficiaries and subrecipients based on the requirements of the Final rule and utilize innovative technology solutions for managing non-profit and other pass-through funding
- Review and Align Jefferson Parish’s current policies and procedures to address the specific program policies and regulations required under ARPA/IIJA U.S. Treasury guidelines and the 2 CFR guidelines
- Assist Jefferson Parish in the creation and maintenance of reports and metrics **required to be reported quarterly for each fund** and individual project category
- Provide **metrics required for federal Funding Accountability and Transparency Act (FFATA)** reports as required
- Implement audit readiness procedures to facilitate compliance with regulatory inquiries and assist Jefferson Parish with **responding to audit findings**

### Our Approach

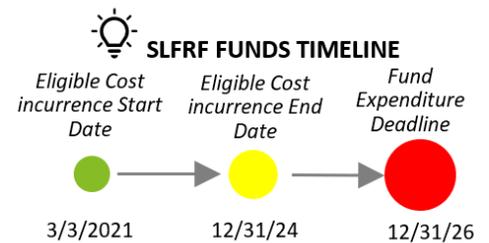
We understand that Jefferson Parish is to use SLFRF funds to cover eligible costs incurred from March 3, 2021, through December 31, 2024, as long as the award funds for the obligation incurred by December 31, 2024, are expended by **December 31, 2026**. To achieve the Parish’s goals and expend the funds by the required deadline, you need an experienced, reputable firm that can collaborate with various stakeholders, conduct need analysis, complete and submit grant applications, provide infrastructure consulting, mitigate audit risk, and other related services. Working with Jefferson Parish, Deloitte will provide:

- Grants management
- Strategy consulting
- Program management and coordination services to assist with efforts related to federal funding opportunities

*We are ready, are you?*

*Based on the detailed technical approach aligned below, Deloitte attests it has reviewed the scope of work, understands the nature thereof and is **willing** and **capable** of providing the services thereof and beyond*

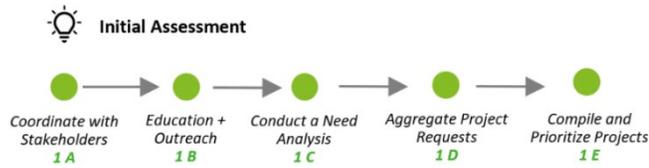
As you will see in the below section, we have extensive experience working with Jefferson Parish and other similar entities and have a clear understanding of the level of support this work requires. Our approach for managing Jefferson Parish’s ARPA, IIJA, CDBG-DR, and other grant funding is derived from Deloitte’s proprietary grant management methodology that has been effectively deployed for decades across various state and local agencies to provide grant management and compliance services including ARPA, IIJA, CDBG-DR, and COVID-19 response related grants. We have tailored our grant management methodology to manage the requested scope of work of Jefferson Parish’s grant funding across the following seven steps of a typical grant management lifecycle:



### Deloitte Grant Management Methodology



## Aligning our Grant Management Methodology to Jefferson Parish’s Statement of Work

Deloitte’s Methodology	RFP Reference
<div style="text-align: center;">  <p><b>STEP 1: Initial Assessment</b></p> <ul style="list-style-type: none"> <li>Conduct a need analysis utilizing existing templates</li> <li>Coordinate with Stakeholders to aggregate project requests utilizing our ARPA/IJA Project Funding Opportunity Aggregator</li> </ul> </div>	<p><i>Section 2.1 (Page 19) Conduct a needs analysis by working collaboratively with the Department of Public Safety Grants &amp; Administration and assigned Parish departments to assess priority projects and funding needs. <b>Our Approach</b></i></p> <div style="text-align: center;">  <p><b>Initial Assessment</b></p> <p>Coordinate with Stakeholders <b>1 A</b> → Education + Outreach <b>1 B</b> → Conduct a Need Analysis <b>1 C</b> → Aggregate Project Requests <b>1 D</b> → Compile and Prioritize Projects <b>1 E</b></p> </div>

### 1A | Initial Assessment | Coordinate with Stakeholders

No project can be successful without all of the relevant parties at the table. To successfully execute a grant program of the magnitude of ARPA, IJA and others, Jefferson Parish will need collaboration from multiple parties including Finance, Budgeting, Accounting, Public Works, Parks and Recreation, Purchasing, Administration, Parish Council, Civic Groups, Business Leaders, Citizens, and others. We recognize each stakeholder has their own perspectives, challenges, interests, and priorities. Our experience coordinating various stakeholder groups at both the State and Local level related to these grants includes:



- ✓ Establishing a mission, enabling the Parish to align behind common goals for investing in the community
- ✓ Defining a cadence and agenda for convening various parties to discuss priorities, progress, and blockers
- ✓ Engaging existing Task Force working groups to provide guidance, perspective, and set priorities

Our team is prepared to assist in this capacity by involving each of the stakeholders throughout the grant process as outlined in the steps below.

### 1B | Initial Assessment | Education and Outreach

More important than having all the relevant parties at the table is ensuring all engaged parties are well educated on the opportunities, deadlines, and requirements funded under each grant. Clearly articulating in excess of 1,000 unique funding opportunities and their individual requirements and alignment with the Parish’s priority projects can seem daunting. That said, the Deloitte team has successfully engaged in working sessions that cover the following topics:



1. Overview of individual stimulus bills, rules, requirements, and deadlines
2. Deep dives of specific programs relevant to the Parish
3. Sample projects that have been funded by other entities
4. “Speed bumps” or known issues that have been identified by the Pandemic Response Accountability Committee
5. Consideration for Construction and period of performance deadlines that must be considered
6. Dates for departments to outline the requirements of each grant program and provide information on grant funding availability prior to aggregating projects.

## 1C | Initial Assessment | Needs Analysis



The steps taken before writing and submitting grant applications are the most crucial for securing a grant. Below are the steps we will take to ensure proper alignment of projects with funding opportunities:

1. Prior to the initial kick-off meeting, Deloitte will review plans and goals previously set by Jefferson Parish to develop a preliminary matrix of funding opportunities aligned with Jefferson Parish's goals
2. At the kick-off and through the stakeholder discussions, Deloitte will conduct a needs analysis then develop a diagram with projects that need grant and funding support. The stakeholder meetings and provided information will generate a refined matrix to support the aligned priority projects with grant opportunities
3. Deloitte will create a comprehensive matrix tracker to categorically break down grants and funding opportunities from ARPA, IJJA, and other grants and align opportunities with Jefferson Parish's identified needs

## 1D | Initial Assessment | Aggregate Project Requests



Data request management is crucial to the long-term effectiveness of Jefferson Parish's grant oversight efforts given the complexities involved in understanding project scopes that may be eligible under ARPA, IJJA, and similar programs, the time horizon in which the funding can be expended, and the pending release of oversight guidance from the federal government. Our team is prepared to stand up a tailored version of our **"ARPA/IJJA | Project Funding Opportunity Aggregator"** – a secure survey that can be customized to intake funding requests from various entities and departments in a format designed for project prioritization discussions. Projects can be grouped by grant scope, such as premium pay for essential workers, respond to COVID-19 and its negative economic impact, and other programs grant opportunities and deadlines. Projects can also be grouped under key IJJA grant scope, such as transportation, climate, energy & environment, and cyber.

**Deloitte.**

ARPA | Project Funding Opportunity Aggregator

Please use the following tool to aggregate funding needs for your department.

Requesting Entity

Agency Name

Agency Contact

Funding Request- #1

Each funding request should be entered separately. Select all cost categories for which your project may be associated and provide an estimated range of funding dollars.

Project Name

Project Description

Project Type (Please select as many as are applicable)

Economic Recovery  Government Services  Payroll Expenses and Benefits Costs  Economic Development

## 1E | Initial Assessment | Compile and Prioritize Projects



Once project requests have been provided, our team will compile the data, identify requests that may overlap in scope, validate the classification and description of projects, and prepare a roundtable for grant leadership review. The results will be aggregated to provide the following:

- Aggregate view of total requested project spend vs. total grant budget
- Visualized representation of project types
- Organization and consolidation of projects to assist the Parish in identifying those with a critical need
- Prioritized list based on available grants, cost share, allowability, and period of performance
- Competitive opportunities that may be available to fund the grant
- Considerations for cost share, asset purchases, Davis-Bacon compliance, forecasted construction timelines

Our team will then facilitate workshops where project proposal results will be analyzed and discussed in detail. Projects will be compared using cost vs. benefit analysis and other benchmarking techniques to account for Jefferson Parish’s unique needs and interests. Based on these methodologies, Deloitte will help Jefferson Parish **rank projects based on priority level** using weighted criteria. Once projects are properly prioritized, our team will move on to begin the funding stream alignment process.

Deloitte will involve its **Infrastructure and Capital Project team** during project formulation and prioritization and throughout the grants management cycle in order to appropriately project timelines for procurement, design, and build times related to capital project investments. Our team will also share insights on broader approaches to managing through known supply chain issues and potential inflation leading to cost overruns for capital projects.

**Deloitte’s Methodology**



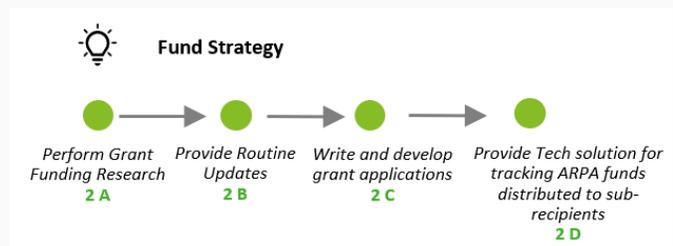
**STEP 2: Fund Strategy**

- Utilize a funding identification accelerator – Deloitte’s FIT to identify funding opportunities
- Develop and submit Grant Applications for JP

**RFP Reference**

- Section 2.1 (page 19 & 20) *Perform grant funding research, as directed, to identify grant opportunities including, but not limited to federal, state, foundation, agencies, and organizations that support the Parish’s priority projects and funding needs.*
- Provide the Parish with routine updates of potential funding opportunities related to priority areas, including names of agencies, due dates for applications, eligibility, program summary, and level of funding available.
- Provide guidance on a technology solution for tracking American Rescue Plan Act funding distribution strategy to sub-recipients.
- Provide technical advisory services related to allowed uses of ARPA funds and respond to questions from the Parish Council and Administration and provide formal opinions regarding the eligibility of specific expenses to be covered by ARPA funds available from federal, state, and other sources.
- Possess experience to write and develop grant applications through the processes of planning, preparation, writing, and submission of pre-proposal and grant applications, including obtaining letters of support, certifications, other documentation in support of the application. Assist in developing grant policies and procedures to comply with specific grant agreements including uniform guidance and existing Parish policies.

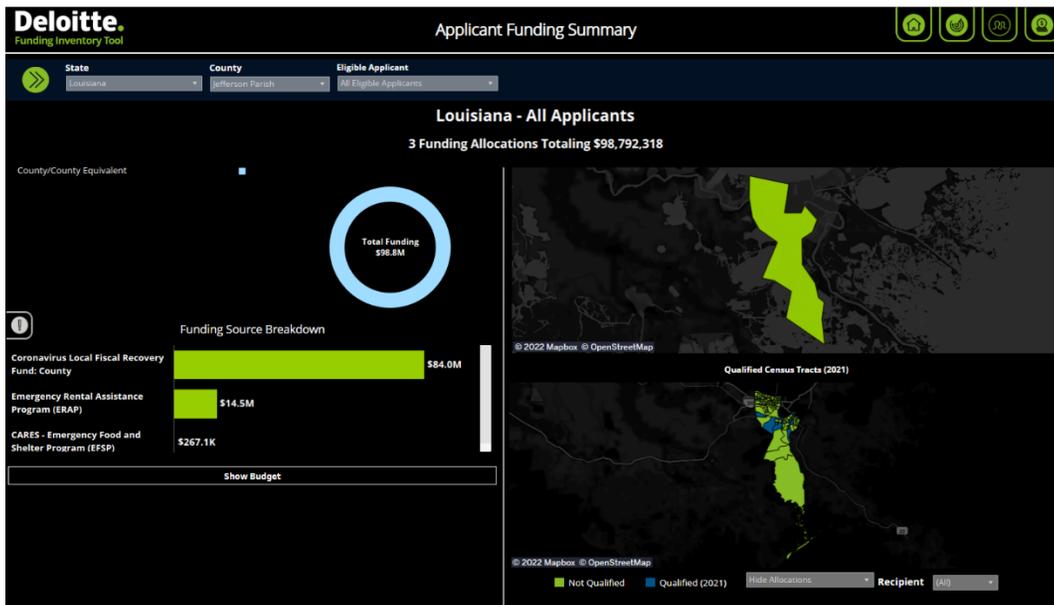
**Our Approach**





**Deloitte’s Funding Inventory Tool (FIT)**

Our funding strategy will focus on identifying grant opportunities including, but not limited to federal, state, foundation, agencies, and organizations that support the Parish’s priority projects and funding needs. We will utilize Deloitte’s Funding Inventory Tool not only to streamline and expedite the grant identification process but to provide the Parish with routine updates regarding eligibility program summary, level of funding available, and applications due dates. Our team has been supporting several states and local governments since 2020 in the administration of their CARES, ARPA, and IIJA funding. With over 400 potential funding streams and thousands of eligible cost categories, the Deloitte Team has indexed the requirements of a majority of recent funding streams authorized under **CARES Act, ARPA, and IIJA** into the Deloitte’s proprietary Funding Inventory Tool (“FIT”). The output of FIT can be used by our clients to develop strategies to expand multiple funding sources (federal, state, and local) and mitigate the risk of duplication of benefits. Deloitte’s FIT can also be utilized to **track ARPA funds distributed to subrecipients.**



*Sample Dashboard of the funding allocations for state of Louisiana using Deloitte’s FIT below*

Benefits of using the Deloitte’s Funding Inventory Tool (FIT) Tool:

- **Tracking and reporting of available grant** dollars across the multiple funding streams
- Tracking **funds distributed to subrecipients**
- Ability to understand funding streams **drill down on eligible costs** with specified explanations per guidance
- Ability to locate where expenditures could be **categorized** based on cost category
- Detailed **tracking and reporting requirements** as defined by **treasury**, including deadlines
- Grant management guidance including management and administrative cost eligibility
- Compliance with **evidence/data-based reporting**
- Evaluation of **equity considerations** as required by the Department of Treasury
- **Geographical overlay** of relevant data (COVID-19 Case rates, School locations, population, etc.)



**DID YOU KNOW**

The demand for contractors has tremendously increased as various counties, states, and local governments secured funding and commenced their projects. Deloitte’s FIT will allow Jefferson Parish to locate and secure competitive funding available in a speedy manner, which will result in avoiding having to compete for contractors when designing projects.

## 2B | Fund Strategy | Routine Updates



In addition to utilizing Deloitte’s FIT to provide routine updates to Jefferson Parish regarding availability of funding opportunities, Deloitte will utilize its multiple Resource Centers and Centers of Excellence on a regular basis. From initial assessments to grant closeout, Deloitte will:

- Leverage its **American Rescue Plan Resource Center** to provide up-to-date guidance on legislation and funding sources available for Jefferson Parish’s response to COVID-19 and its economic recovery.
- Provide guidance on how to utilize funding streams or adjust processes with emerging federal and state compliance requirements or changes
- Engage our **Infrastructure Investment and Jobs Act (IIJA) Center of Excellence** to provide an edge to the delivery team in competitive grant writing and administration by leveraging best practices from other projects nationwide
- Help Jefferson Parish prepare for federal audits, salvaging projects plagued with cost overruns and budget shortfalls, and facilitating monitoring of expenditures to meet grant closeout guidelines.

Our effective and efficient management of large recovery programs allows engagement at federal, state, and local leadership levels to establish credibility with legislatures, program officials, inspectors general, and auditors.




**DID YOU KNOW**

Our COVID-19 Resource Centers have helped 100+ States, counties, cities, and local municipalities create financial confidence and transparency throughout their grant management processes

### Participate in Regular Calls and Timely Address Urgent Matters

Deloitte will designate a Point of Contact (POC) for each project and subrecipient and will share the contact details with all relevant parties to participate in calls and address questions and issues during business hours. Deloitte will also be ready to have monthly status updates for Jefferson Parish. Additionally, we will designate at least one Project Manager per week to address questions and concerns outside of business hours.

As an alternate, the parish will also have the option to utilize **Deloitte’s contact centers with round the clock support**. The Deloitte team has a demonstrated track record of success in delivering Contact Center solutions across industries and have a proven history of rapidly standing up such Centers and deploying customer service agents in response to crisis situation.




**DID YOU KNOW**

In 2021, Deloitte successfully deployed 150 major contact centers in response to COVID-19 currently providing 4,500 agents.

## 2C | Fund Strategy | Develop and Submit Grant Applications



As Jefferson Parish identifies competitive grant opportunities, our team is prepared to help facilitate discussions with and navigate the various resources that will be made available through the State by the Governor’s Infrastructure Coordinator and Office of Planning as well as through the Louisiana Infrastructure and Technical Assistance Corporation (“LITAC”), an organization created by the Louisiana Municipalities Association and the Louisiana Police Jury. These resources will create opportunities for entities like Jefferson Parish to align to State strategies that increase the likelihood of success for competitive grant awards, provide resources to support project execution, and deliver technical support in coordination with various State Agencies overseeing other grant spending in the State.

## Grant Pursuit Determination

The first step after identifying a grant opportunity using Deloitte’s FIT tool is to understand what the grant is asking and what the grant will provide. Tackling the latter question is where the grant process begins. Identifying the grants that best meet the needs of Jefferson Parish and the 400,000+ people who live in the community is of the utmost importance. After the initial release of the grant, the Deloitte team will do a thorough review and conduct a “go or no go” meeting with Jefferson Parish to determine if Deloitte will continue forward with writing the grant.



GO/NO GO Meeting Cheat Sheet

GO

NO GO



- Grant fits the needs of Jefferson Parish
- Grant qualifications and requirements can be met
- Grant aligns with the corporate strategy and technology roadmap
- Grant does not fit the needs of Jefferson Parish
- Grant qualifications and requirements cannot be met due to various reasons
- Grant does not align with the corporate strategy and technology roadmap

## Grant Application Development

The next step is writing the grant applications. Deloitte’s extensive experience with federal grants means that our team has a deep understanding of the nuances of federal grants. We work closely with our clients throughout the grant application development process to best align project priorities, approaches, and outcomes with the overall intentions of each federal grant opportunity and that federal priorities of climate, equity, and job creation are reflected in the application. We will leverage our compliance experience to anticipate additional compliance requirements and implications of Buy America, Justice40, Davis-Bacon Act, and other applicable provisions. Additionally, we can support the stakeholder engagement that precedes the development of a competitive regional or intergovernmental project. For each pursued grant, a timeline of deliverables will be set following the grant’s requirements to facilitate compliance.



Deloitte’s consulting and advisory practice has a wealth of practitioners who can contribute as Subject Matter Advisors (SMAs) from supporting budget development to technical content writing. As part of the deliverable timeline, the grant will be drafted with time for review by internal Jefferson Parish staff and Deloitte’s copywriting team. Following final acceptance by Jefferson Parish, the grant will be submitted. The Deloitte team is committed to supporting Jefferson Parish in **identifying and winning multiple grants** using the process outlined in the graphics above and below.

**IJA: Differentiating Jefferson Parish when pursuing Competitive Grants**

**1 Research**  
Deloitte will research the grant requirements, agency issuing the grant, purpose of the grant, key performance indicators (KPIs). Deloitte will then outline those key programmatic objectives and KPIs before working collaboratively to articulate the project descriptions that best meet those goals

**2 Follow the Rules**  
Grants often have a lot of requirements and stipulations, many of which are small and easy to overlook. Deloitte will develop detailed checklists inclusive of requirements, eligibility considerations, key deadlines, etc. to facilitate the competitive grant application **covers the elements** in the grant requirements.

**3 Coordinate + Match**  
Our team will be intentional in working with Jefferson Parish and their stakeholders to identify and match the projects with the suitable grants.

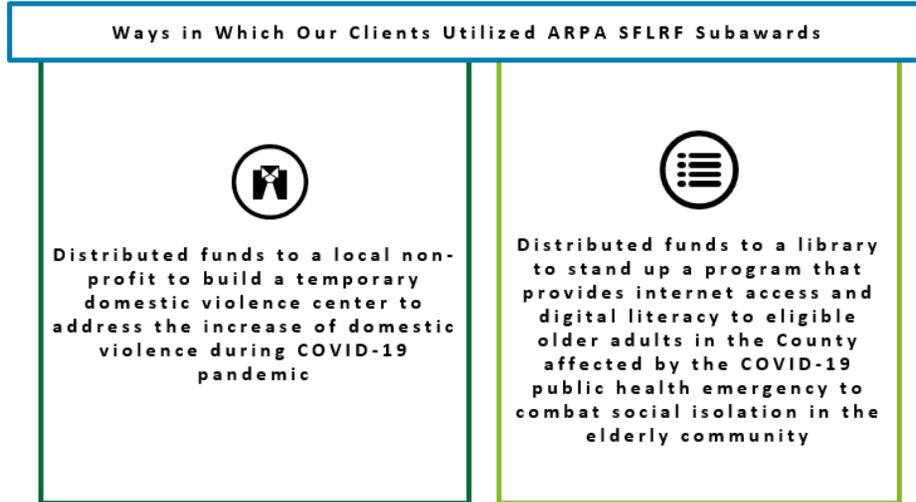
**4 Capacity**  
Grant applications often include scoring based on capacity. The Grantor wants to ensure the grantee has the capacity to manage the grant in order to facilitate the funds are fully utilized. The Deloitte team has a significant staffing pool to facilitate there is capacity to help Jefferson Parish not only win the grant but to manage it from start to finish

IJA offers grants – many of which are competitive. Competitive grants bring a unique challenge as agencies must differentiate themselves from the countless other entities applying for the same bucket of funds. There are a couple steps Deloitte will take to help **Jefferson Parish differentiate itself from the competition and maximize the likelihood of successfully winning grant funding.**

## 2D | Fund Strategy | Tech Solution to Track Funds Distributed to Subrecipients



With multiple funding streams to manage, tracking funds distributed to subrecipients may seem impossible. That said, we understand the importance and the necessity of allowing funds to trickle down to subrecipients. Thus, Deloitte is not only prepared but is eager to utilize its **Funding Inventory Tool (FIT)** to assist Jefferson Parish with **tracking funds distributed to subrecipients**. Many of our clients have sub awarded grants to meet their community’s needs and we believe Jefferson Parish should not hesitate to do the same in fear of the challenges of tracking funds distributed to subrecipients. See an example of sub awarded projects in the graphic below.



<p><b>Deloitte’s Methodology</b></p>  <p><b>STEP 3: Policy + Strategy Development</b></p> <ul style="list-style-type: none"> <li>• Loss Revenue Calculations</li> <li>• Grants Policies + Procedures review/manual</li> <li>• Compliant Use of ARPA, IJJA, and Other Grant Funds</li> </ul>	<p><b>RFP Reference</b></p> <ul style="list-style-type: none"> <li>- Section 2.1 (Page 19 &amp; 20) Develop and implement strategies designated to maximize various federal and state funding sources (e.g., ARPA and future infrastructure bills).</li> </ul> <p><b>Our Approach</b></p> <div style="text-align: center;">  <p><b>Strategy + Policy Development</b></p> </div> <div style="text-align: center;">  </div> <table style="width: 100%; text-align: center;"> <tr> <td>Maximize Funds  </td> <td>Grants Policies +</td> <td>Compliant Use of</td> </tr> <tr> <td>Loss Revenue</td> <td>Procedures</td> <td>Funds</td> </tr> <tr> <td>Calculations</td> <td><b>3B</b></td> <td><b>3C</b></td> </tr> <tr> <td><b>3A</b></td> <td></td> <td></td> </tr> </table>	Maximize Funds	Grants Policies +	Compliant Use of	Loss Revenue	Procedures	Funds	Calculations	<b>3B</b>	<b>3C</b>	<b>3A</b>		
Maximize Funds	Grants Policies +	Compliant Use of											
Loss Revenue	Procedures	Funds											
Calculations	<b>3B</b>	<b>3C</b>											
<b>3A</b>													

## 3A | Policy + Strategy Development | Maximize Funding Strategy | Loss Revenue Calculations



ARPA funds can be used to replace lost revenue resulting from COVID-19 pandemic. We understand the computation of revenue loss is complex as it requires thorough understanding of what is to be included in the calculation. We also understand the Parish has calculated a total revenue lost for 2020 and 2021 in the amount of \$80M. Fortunately, Deloitte has completed loss revenue calculations for various entities and was oftentimes able to find more funding for our clients through **subsequent reviews of their initial loss revenue calculations**. In addition to conducting revenue loss computation, Deloitte will assign the appropriate expenditure category for each project for Jefferson Parish. Assigning the Parish’s lost revenue projects to other eligible expenditure categories (EC) is crucial as it frees up lost revenue to be utilized for other projects.

Revenue loss funds may be used for government services such as:

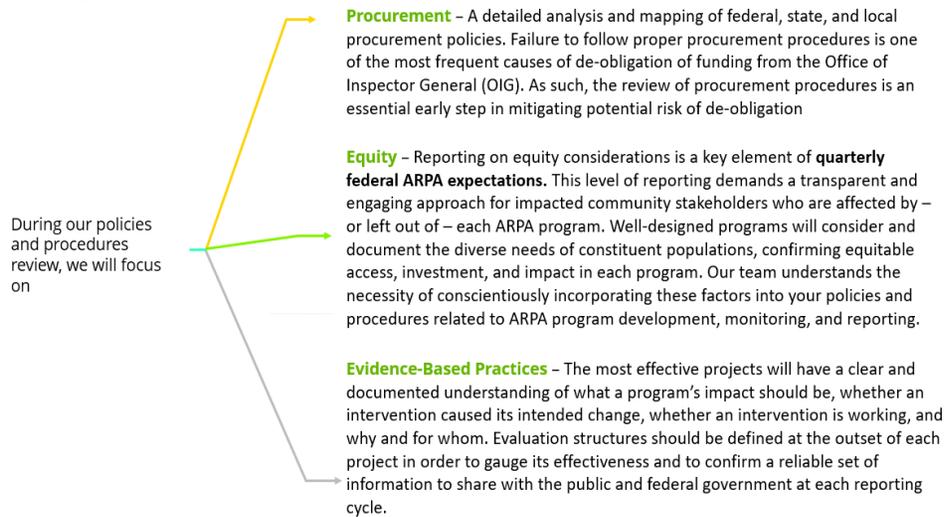
- Pay-go funded buildings of infrastructure including roads
- Modernization of cybersecurity, including hardware, software, and protection of critical infrastructure
- Health Services
- Environmental Remediation
- School or educational services
- The provision of police, fire, and other public safety services

### 3B | Policy + Strategy Development | Grants Policies + Procedures

#### Review Program Guidelines, Policies, and Procedure Documents



Maximizing federal and state funding requires a coherent understanding of each grant’s policies and procedures. We will review and align Jefferson Parish’s current policies and procedures to the program policies and regulations required under ARPA/IIJA U.S. Treasury guidelines and the 2 CFR guidelines with a focus on helping to assess and enhance internal controls in areas with the greater exposure to risk.



#### Update and Implement Required Changes to Policies and Procedures

Once the updates to the policies and procedures have been accepted by Jefferson Parish, our team will develop guidance documents, trainings, quick reference one-pagers, and easy-to-follow flow charts to disseminate the information to applicable Parish personnel. This will aid in creating uniform work products, minimizing risk of non-compliance and de-obligation, and providing consistency in program management operations and cost tracking practices across the agency. The processes described above can be performed for multiple grant agreements.

### 3C | Policy + Strategy Development | Compliant Use of ARPA, IIJA, CDBG-DR, and Other Grants



Deloitte’s proposed team includes highly skilled and knowledgeable staff who understand the federal regulations and have first-hand knowledge of ARPA, IIJA, CDBG-DR, and CARES Act funding. Our team will leverage their past experience in the State of Louisiana and combine Jefferson Parish’s current system capabilities with proprietary Deloitte cost tracking and funding strategy tools to maximize **timely identification and tracking of reimbursable expenses** and proactively **aligning them with appropriate funding streams** to minimize reconciliation effort required at closeout. This will also reduce duplication of benefits under multiple funding streams that can result in audit findings and future deobligations.

The below graphic illustrates the main areas that we will focus on in our funding strategy development including:

- Revenue Analysis
- Contract and Procurement Review
- Cost Eligibility
- Duplication of Benefits



### REVENUE ANALYSIS

Setting reasonable expectations for incoming cash flows is a critical component of any public program as the timing of incoming funds largely impacts when specific programs can be implemented.

As such, Deloitte is prepared to project the counterfactual trend of anticipated annual revenue until December 2023, as required by the U.S. Treasury.

We will compare actual revenue to the counterfactual revenue to determine and document the reduction in revenue on an annual basis.



### CONTRACT AND PROCUREMENT REVIEW

If the correct documents are obtained during the reimbursement request process, the burden of closeout process, future audits or appeals processes, are dramatically decreased. To achieve that goal, we will set up a quality review process including procurement checklists to:

- Mitigate instances of inadequate procurement
- Detect improper payments, incorporate required contract clauses
- Minimize out of scope and ineligible expenses, and other grant payments that could result in de-obligation



### COST ELIGIBILITY

To minimize risk of de-obligation, Deloitte will proactively review expenditures against eligibility and compliance requirements, validate conformance of program expenditures against the established scope of work, while regularly reporting exceptions and corrective actions. This approach includes gathering all associated supporting documentation such as :

- Relevant work type summary sheets
- Proof of payment
- Contract documentation
- Procurement support
- Cost reasonableness substantiation along with required forms with detailed explanation of work activities to minimize Requests for Information (RFIs) that often lead to de-obligation later in the grant lifecycle

Finally, we will work closely with Jefferson Parish staff to evaluate the costs for compliance with federal, state, and local regulations.



### DUPLICATION OF BENEFITS

A common challenge encountered when multiple funding streams are involved is duplication of benefits. Our team will:

- Work closely with those executing the grant activities to compile the required documentation and segregate insurance claims from program expenditures to proactively demonstrate compliance.
- Recommend protocols to track donated time and resources as that's often highly scrutinized.
- If needed, we will notify appropriate personnel when we discover instances of duplication and will work with Jefferson Parish to understand both the issue and resolution.

## Fund Management

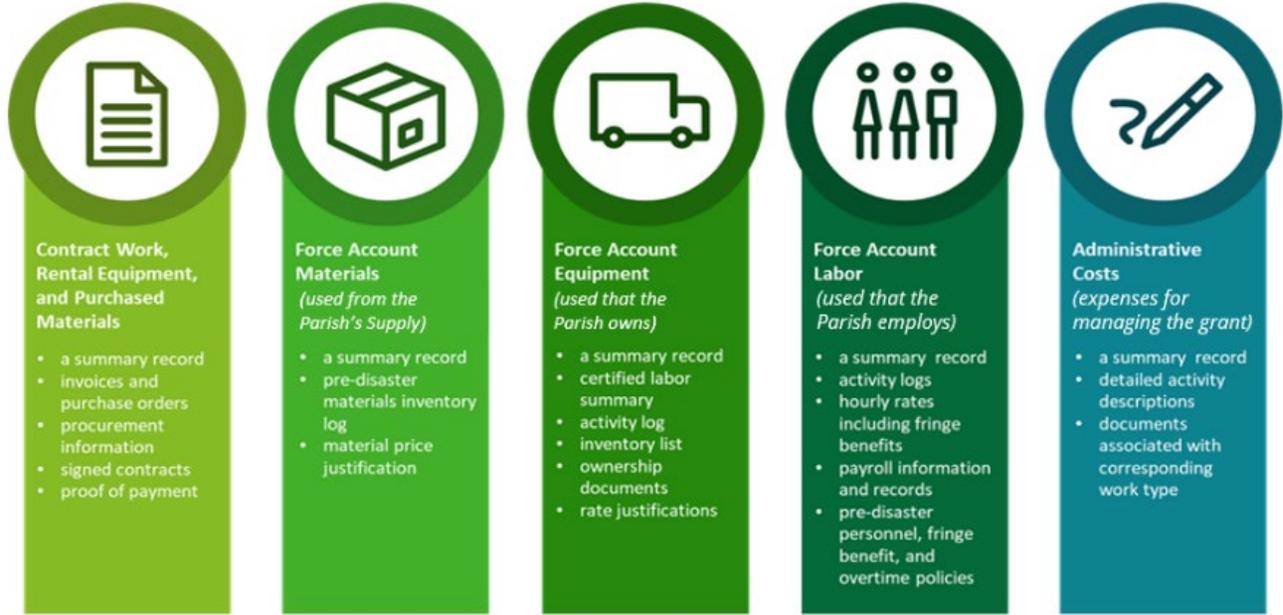
We understand Jefferson Parish will prioritize projects which are needed and neatly align themselves with the specific funding source targeted which may have been previously considered impossible due to the lack of funding stream(s) available to the Jefferson Parish. Deloitte will:

- Prioritize Jefferson Parish's infrastructure capital needs by proactively reviewing project details against eligibility and compliance requirements, verify conformance of program expenditures against the established scope of work, and regularly report exceptions and corrective actions.
- Work closely with Jefferson Parish's Budgeting team to ensure grant funding received in advance is set aside in the appropriate reserves given the large number of potential funding sources available under ARPA, IJJA, CDBG-DR, and other grant funds. This will allow for easier alignment to the appropriate project after eligibility reviews are performed and Council approvals are received.

If a reimbursement-based grant is secured, Deloitte will work closely with Jefferson Parish's Finance team to facilitate costs are tracking at the appropriate level of detail and can be easily tracked by project, as described in the next section.

## Cost Categorization

Our team will assist the Parish in identifying, tagging, and archiving the applicable expense category required for both reimbursement and reporting. This process will help ensure that the appropriate documents required for each expense category are accounted for. Standard cost types across multiple federal programs are provided below for reference. Additional categories and subcategories may vary by subprograms and the applicable documentation requirement for additional categories will be presented in a similar format to organize supporting documentation required for reimbursement.



### Deloitte's Methodology



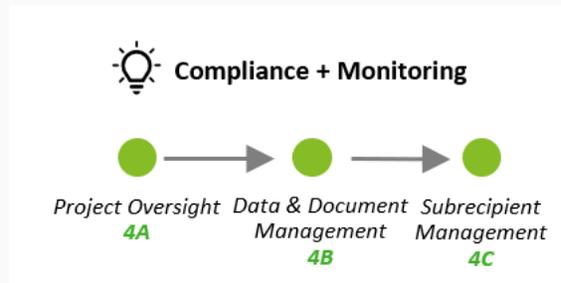
#### STEP 4: Compliance + Monitoring

- Deloitte's COVID-19 Resource Center
- Project Oversight
- Data and Document Management
- Subrecipient Management

### RFP Reference

- Section 2.1 (Page 19 & 20) Develop appropriate documentation to demonstrate compliance with ARPA guidance.
- Develop processes and documentation requirements around sub-recipient risk assessment, monitoring and management, including training of subrecipients on funding requirements.

### Our Approach

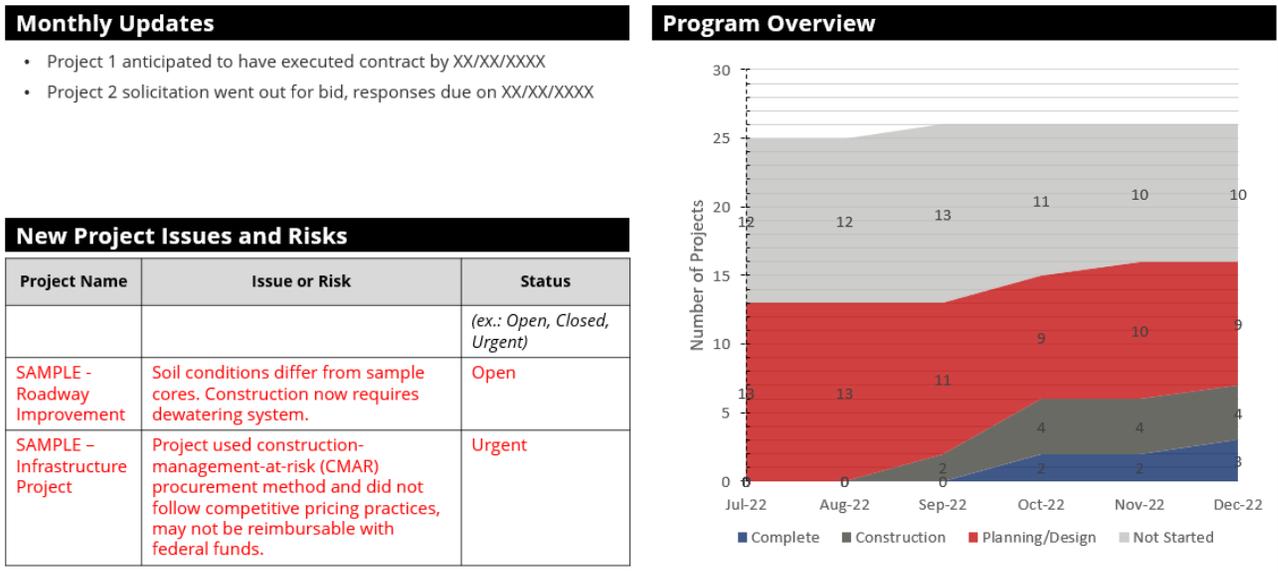


## 4A | Compliance + Monitoring | Project Oversight



Construction projects are challenging to track as they require multiple phases including a design phase. Deloitte will focus on:

- Tracking project progress against established goals and identify Risk Indicators that may be hindering progress.
- Prepare visual dashboards and reports to be presented on a regular basis to provide transparency and actionable insights into the financial and operational status of the program.



A sample dashboard of operational progress and risk management



**DID YOU KNOW**

Deloitte can generate various dashboarding that focus on: “total project obligated amount vs. actual project cost”, “total amount submitted for reimbursement vs. amount reimbursed”, “reimbursement request aging reports”, “historical performance vs. established operational goals”, and “standard status reports at the project level”

## 4B | Compliance + Monitoring | Data and Document Management



The team can assist Jefferson Parish in evaluating and closing gaps in the existing document management and archiving system to meet the requirements set forth under the Uniform Grant Guidance and U.S. Government Accountability Office Green Book. At a minimum, our team will confirm that the data and backup documentation being tracked is:

- **Sufficient:** To conduct cost assessments, track cost estimates, and monitor project progress
- **Complete:** To tell the full story of the expenses from procurement through proof of payment
- **Consistent:** To resolve inconsistencies among the different sources

If needed, our team is prepared to implement a centralized data repository to organize supporting documentation by funding streams, track funding applications and respective distribution status and obligation balances. Supporting documentation will be linked to each expense to:

- Avoid duplication of benefits
- Speed up funding application process
- Enforce the compliance monitoring
- Accelerate oversight review processes and avoid potential findings
- Allocate funding distribution
- Produce timely reports

Additionally, we will recommend necessary controls to allow retention of the documentation for the required duration mandated under the federal guidelines and closeout requirements applicable with each type of grant funding per the most restrictive of the federal, state, and local requirements.

We understand the challenge of managing funds distributed to subrecipients in a manner compliant with ARPA, IJJA, and other grants laws and regulations especially when administering various grants. That said, Deloitte has extensive experience assisting entities manage funds distributed to subrecipients including conducting subrecipients risk assessment, subrecipient monitoring and management, and subrecipient trainings on funding requirements. We will coordinate with Jefferson Parish to implement a strong, streamlined subrecipient managing process.

- **Increase Transparency** - In our experience, subrecipients benefit from transparency, entities cannot comply with what they do not know. Upon securing grant award, Deloitte will schedule a meeting with Jefferson Parish’s subrecipients and provide them all required compliance regulations. Additionally, Deloitte will offer office hours as needed for subrecipients to clarify questions and concerns.
- **Disseminate New Information Regularly** - Deloitte and Jefferson Parish will be the first point of entry to regulations for many subrecipients, we will ensure they remain abreast of all ARPA, IJJA, and other grants most recent laws and regulations
- **Maintain Momentum** - Maintaining momentum is crucial as it allows for proper monitoring of subrecipients. Upon project kick off, Deloitte will work with Jefferson Parish to implement a comprehensive subrecipient monitoring strategy and offer guidance, as needed, throughout the grant cycle.

**Risk Assessment** - Deloitte will perform a risk assessment on subrecipients using risk assessment tools after gathering relevant data generated by Jefferson Parish. We will tailor the tools and templates using the Risk Integrity Monitoring Reports, Assessment Summary, and associated Risk Matrix forms. Once the assessment is complete, our team will perform a detailed analysis on subrecipients that are deemed high risk to detect potentially ineligible expenditures and/or potential fraud, waste, or abuse.



**DID YOU KNOW**  
 ARPA projects aligned to expenditure categories 6.1 and 6.2 are **NOT** required to report subrecipient, subaward, or expenditures (for a subaward) programmatic data in their quarterly reports

<p><b>Deloitte’s Methodology</b></p> <div style="text-align: center;">  </div> <p style="color: green; text-align: center;"><b>STEP 5: Cost Tracking, Accounting, and Reporting</b></p> <ul style="list-style-type: none"> <li>• Tracking Capabilities</li> <li>• Reporting and Federal Filings</li> </ul>	<p><b>RFP Reference</b></p> <ul style="list-style-type: none"> <li>- Section 2.1 (Page 19&amp; 20) Review and assist with processing payment requests, determining allowable costs.</li> </ul> <p><b>Our Approach</b></p> <div style="text-align: center;">  </div>
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**5A | Cost Tracking, Accounting, and Reporting | Tracking Capabilities**

Based on our experience, the key to timely and efficient reporting is adequate tracking capabilities built into an entity’s financial system. Deloitte will:

- Evaluate Jefferson Parish’s existing financial tracking capabilities
- Make recommendations to **create cost code containers** to tag and aggregate expenditure and revenue transactions related to ARPA, IJJA, CDBG-DR, and other grant funded projects

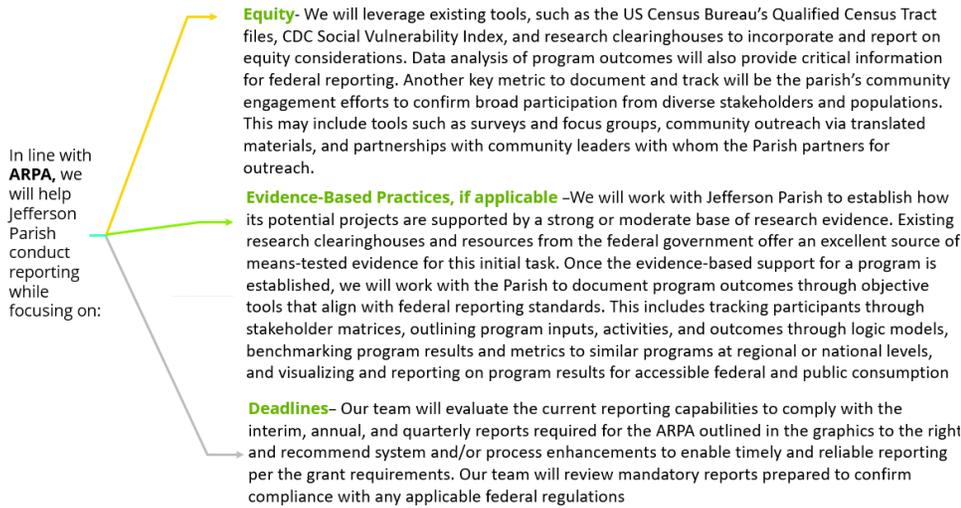
This would allow for seamless **interim, quarterly, and annual performance** reporting of expenditure transactions required by U.S. Treasury. Comprehensive and detailed tracking capabilities built into an entity’s financial system has proven to save considerable amount of time reconciling costs at closeout and is also linked to a lower rate of questioned costs.

Additionally, this would allow our team to compare ARPA, IJIA, and other grants related expenditures from Jefferson Parish’s financial systems against the database of eligibility requirements and allowability guidelines loaded in Deloitte’s **Funding Inventory Tool** to streamline allowability reviews on payment requests.

## 5B | Cost Tracking, Accounting, and Reporting | Reporting and Federal Filings



Our approach to evaluation and reporting on ARPA, IJIA, CDBG-DR, and other grant programs will be heavily influenced by **evidence and data**. This reflects the U.S. Treasury’s reporting requirements, which identify the need for ARPA and IJIA projects to be designed, implemented, and monitored in a manner conscious of leading practices backed by research and objective metrics for evaluating their impact and outcomes. More specifically, treasury expects ARPA recipients to incorporate **equity considerations** in their program execution and reporting and identify the amount of funds allocated to **evidence-based interventions** or to projects undergoing rigorous evaluation. To this end, our team is dedicated to confirming Jefferson Parish’s ARPA programs meet this standard to a high degree, both for federal reporting and public scrutiny. Additionally, our team will provide monthly status reports of project progress and recovery outcomes to Jefferson Parish.



## Prepare Filings Required for Funding Agencies

Deloitte will monitor the process and generate custom progress reports to monitor contract performance and meet federal filing requirements. From a cash management perspective, these financial overview reports will include identified funding sources, amounts of identified funding, submitted funding requests, approved and denied funding requests, percent of supporting documentation gathered, amount of funding received and accounted for, projected schedule for reimbursements, and total amount of funding closed out. From a management perspective, these reports will include activities completed, future activities planned, revisions, submissions and approvals, open items, identified risks, possible risks, and milestone dates. We will assist Jefferson Parish in the creation of reports and **metrics required for each fund**, perform periodic reconciliations including quarterly reports, organize information needed for the federal yearly Single Audit, and provide metrics required for federal Funding Accountability and Transparency Act (FFATA) reports as required. An illustration of the key areas to consider while completing these filings are detailed on the following page.

Table 4: Annual Project and Expenditure Report timeline

Report	Period Covered	Due Date
1	March 3, 2021 – March 31, 2022	April 30, 2022
2	April 1, 2022 – March 31, 2023	April 30, 2023
3	April 1, 2023 – March 31, 2024	April 30, 2024
4	April 1, 2024 – March 31, 2025	April 30, 2025
5	April 1, 2025 – March 31, 2026	April 30, 2026
6	April 1, 2026 – December 31, 2026	April 30, 2027

Table 3: Quarterly Project and Expenditure Report Timeline

Report	Year	Quarter	Period Covered	Due Date
1	2021	2 – 4	March 3 – December 31	January 31, 2022
2	2022	1	January 1 – March 31	April 30, 2022
3	2022	2	April 1 – June 30	July 31, 2022
4	2022	3	July 1 – September 30	October 31, 2022
5	2022	4	October 1 – December 31	January 31, 2023
6	2023	1	January 1 – March 31	April 30, 2023
7	2023	2	April 1 – June 30	July 31, 2023
8	2023	3	July 1 – September 30	October 31, 2023
9	2023	4	October 1 – December 31	January 31, 2024
10	2024	1	January 1 – March 31	April 30, 2024
11	2024	2	April 1 – June 30	July 31, 2024
12	2024	3	July 1 – September 30	October 31, 2024
13	2024	4	October 1 – December 31	January 31, 2025
14	2025	1	January 1 – March 31	April 30, 2025
15	2025	2	April 1 – June 30	July 31, 2025
16	2025	3	July 1 – September 30	October 31, 2025
17	2025	4	October 1 – December 31	January 31, 2026
18	2026	1	January 1 – March 31	April 30, 2026
19	2026	2	April 1 – June 30	July 31, 2026
20	2026	3	July 1 – September 30	October 31, 2026
21	2026	4	October 1 – December 31	April 30, 2027

**THINGS TO CONSIDER...**

Document Management	Continued Communication	Reporting
<p>While going through the engagement, it is important to retain documentation to meet the requirements of Uniform Grant Guidance. Our team is prepared to assist in readying systems for proper document management.</p>	<p>Communication of reports and deadlines through the life of the project is critical. Our team is prepared to provide monthly reports of all ARPA activities as well as weekly calls with LCG Leadership. This will ensure the continued focus on efficiency and efficacy through the life of the project. These reports will also allow communication between LCG and the constituents of Lafayette, so that the public will be informed as well.</p>	<p>ARPA Projects need to be designed, implemented and monitored throughout the life of the project. In phase two of our approach, our team is prepared for Federal Filings and reporting.</p>

**Deloitte’s Methodology**



**STEP 6: Inquiry Resolution Services**

Request for Information

**RFP Reference**

- Section 2.1 (Page 19 & 20) Resolve any requests for information, justification, audit findings, and eligibility appeals.
- Assist with preparation of project files and responses to any findings and/or concerns identified during monitoring visits and/or audits by any requesting entity.

**Our Approach**



**Inquiry Resolution Services**

Request for Information  
6A

**6A | Inquiry Resolution Services | Requests for Information**



Our mission of increasing the amount of funding available for Jefferson Parish’s use requires our team to be able to provide responses to RFIs and assessments with which the Parish disagrees. RFIs will be closely monitored by assigned project staff as well as by the Project Manager and response times will be monitored as a key performance indicator for our staff. The key to timely and comprehensive responses to RFI relies on high quality audit trails and documentation of project history and artifacts. We will employ strong data management, documentation, and archiving protocols to allow timely responses to RFI. We will collaborate with relevant government staff contacts if additional detail is warranted to substantiate a response. In the event, an assessment is issued with which Jefferson Parish disagrees, it can be appealed within 60 days from the receipt of a written determination by the Grantor; hence our team will prioritize responses to such requests.

**Deloitte’s Methodology**



**STEP 7: Closeout Support**

- Closeout Support
- Audit Support
- Appeal Support

**RFP Reference**

- Section 2.1 (Page 19 & 20) Provide Parish with grant funding close-out services to ensure funding is retained.
- Prepare and review documentation and reports for completeness to ensure eligible work and costs are captured for audit.

**Our Approach**



**Close-out**



## 7A | Closeout Support | Grant Closeout



Our team will perform each requested task requested in this RFP with closeout in mind. Our strong document management, retention and audit-trail practices will minimize the time and effort associated with extensive reconciliations and justifications that are often required at closeout due to poor administration of the grant upfront. Deloitte is very familiar with the grant closeout process as we **designed, implemented,** and are now **executing** the closeout process for State of Louisiana and Commonwealth of Puerto Rico encompassing approximately **\$40 Billion in federal grants.** Nevertheless, we will perform a comprehensive review of the grant files prior to closure and review each project for:

- Cost overruns to be requested at closeout
- Draft justification of additional claims for eligibility review
- Itemize and segregate insurance/alternate funding per project to defend a duplication of benefit assessment

We recognize the importance of transparent and defensible audit trails in federal funds management. In instances where non-compliance is identified, we will deploy subject matter resources to uncover root causes of issues, generate corrective action plans, and provide technical assistance (e.g., training and outreach) to **help subrecipients demonstrate compliance.** These steps will help Jefferson Parish create audit-ready support packages including financial and program-related performance support, all maintained in a secure system. Our team is ready to implement these procedures to assist Jefferson Parish in its work towards easier and faster closeout and external audit.

**CLIENT TESTIMONIAL**

Deloitte's continued involvement in the closeout process has enabled the state to seamlessly close billions of dollars in disaster funding and be better prepared for potential audits. The strategic guidance and insights provided by Deloitte throughout the recovery process is what truly sets them apart!

Kennon Clayton  
Section Chief, Closeout  
State of Louisiana Governor's Office of Homeland Security and Emergency Preparedness

## 7B | Closeout Support | Audit Support



Deloitte can help **implement audit readiness procedures to facilitate compliance with regulatory inquiries and assist Jefferson Parish with responding to audit findings.** Throughout the engagement, we use quality assurance and quality control (QA/QC) processes to detect potential indicators of fraud, waste, and abuse. The team can assist Jefferson Parish with audit finding resolutions and be available to provide feedback on corrective action plan development. Once a corrective action plan is finalized, the team can assign staff resources to follow-up on corrective action plan elements and timelines to facilitate timely resolution of audit findings and issues. An example of our experience providing audit support is when we were able to **substantiate approximately 80% of the costs questioned** by an OIG audit for St. John the Baptist Parish under our Subrecipient Assistance contract with GOHSEP.

## 7C | Closeout Support | Appeal Support



We approach each project application in a manner designed to reduce the need to file appeals, as the appeals process can be time consuming and can offer uncertainty for recovery efforts for extended periods. To this end, we work vigorously to help our clients negotiate and resolve issues with stakeholders prior to recommending the necessity of an appeal. With the support and concurrence of our clients and backed-up by our extensive program knowledge and visibility into past precedents, our professionals routinely help our clients in conversations with the FEMA Project Officer, Grant Coordinators, HMA Branch Chiefs, and leadership in the Joint Field Office, as well as leverage our relationships with leadership in federal regional offices and headquarters, to address concerns and try to reach agreement without having to go to appeal. In the instance an appeal is required, our professionals have experience in helping our clients to prepare, argue, and effectively resolve appeals. **Deloitte developed the Sanctions and Appeals program for the State's \$19 billion in federal grant funding.** We therefore have the experience to work, under Jefferson Parish's direction, and meet directly with federal and oversight agencies and other stakeholders to determine grounds for possible appeals, help frame the information to address rules and guidelines, support in the creation of supplemental responses to the Parish's appeal, and assist in preparation of oral argument, as required. We will assist Jefferson Parish in developing appeal information including a description of the situation, supporting documentation, the total expense value in dispute, and an analysis of the Parish's position, highlighting the regulation or policy with which the disagreement concerns.

# D. Proposer Qualifications and Experience

History and background of proposer, including but not limited to status with related services to government entities existing customer satisfaction, demonstrated volume of merchants, etc. Minimum requirements include:

- Years of Experience
- Certifications and Training
- Listing of Grant Applications Completed
- Listing of Grant Award Amounts and Entity Assisted

This section meets the requirements of section 2.7 Proposal Elements, B. Qualifications and Experience on page 22 of the RFP which requires:

- Detailed description of firm's years of experience (minimum requirement of 5 years' experience) in grant research, writing, management, reporting, and audit to successfully procure funding related to local, state, and federal infrastructure grants and American Rescue Plan Act (ARPA) funding.
- Resumes of all key personnel to be assigned to this RFP scope of work/services shall be submitted. Resumes of all subcontractors shall also be submitted.
- References from at least three firms (governmental and/or private) for whom an equal or larger scope of work/services are either currently being provided or provided in the past two (2) years. Contact person(s), addresses and telephone numbers for each reference provided shall be included.

## Brief History

The predecessor organizations of Deloitte date back **175 years** and have grown over time to become the **largest private professional services network in the world**. With over 335,000 people worldwide, 113,000 employees in the United States, and over \$23.2 billion in annual revenues, Deloitte and its subsidiaries, **collectively referred to as Deloitte in this proposal**, provide audit, risk & financial advisory, regulatory compliance, tax, and consulting services in more than 150 countries/territories across 20 industries. The power of our world-wide network, tested methodologies, and state of the art tools and technology allows us to bring the best of the firm to Jefferson Parish Government to successfully navigate massive federal projects such as **ARPA, IJA, and CDBG-DR**.

## Nature and Extent of Federal Grant Knowledge

**For the past 30 years**, Deloitte has helped its clients assess, administer, monitor, and close some of the **nation's largest and highly complex federal assistance programs** such as FEMA Public Assistance grants under the Stafford Act, HUD Community Development Block Grant – Disaster Recover (CDBG-DR) programs, American Reinvesting & Recovery Act (ARRA) grants, as well as COVID-19 relief grants authorized under the CARES Act, Consolidated Appropriations Act of 2021 (CAA) and American Rescue Plan Act (ARPA), and other related legislation.

As one of the largest professional services firms in the world, not only do we have the requisite experience managing **large, complex, and critical programs at the level of ARPA & IJA** and the complexity of **cross-agency coordination** that comes with it, but also the capability to scale better and faster than other companies. We believe that we are uniquely qualified to best support the Jefferson Parish Government because our team **brings decades of experience working at all levels of government** from small cities to federal granting agencies. We have the experience necessary to support state and local government formulation of priorities and execution strategies through our consulting services which include these key elements:

- **Grants Management** – We have the scale to develop and implement comprehensive infrastructure and grants management plans through the whole grant's lifecycle of project prioritization, grants application, KPI development, impact assessment, financial planning, and asset management. We provide our clients with resolute advisory and end-to-end grants management including cost tracking, recordkeeping, documentation, reporting, program integrity and compliance monitoring.



### PROVEN EXPERIENCE

Deloitte ranked **#1 in the Public Accounting Report's Top 10 U.S. Accounting Firms survey (2021)**

Deloitte was named a **leader in US State & Local Government Consulting**; and in **Forensics Investigation Advisory** services by ALM Intelligence

Worked intimately with **over 100 subrecipients across Louisiana** by providing over 15 years of federal assistance program support, yielding **over \$19 billion** in federal grant expenditures

Established an **ARPA/IJA Resource Center** to provide up-to-date guidance and interpretation of new policies from Treasury to help entities across Louisiana effectively manage ARPA and IJA guidelines



## Examples of Previous Projects with Relevant Federal Grant Experience

Although, our experience with federal grants management spans across over 50 federal, state, and local agencies, we present a select few examples in the table below that align with the services requested by Jefferson Parish Government to demonstrate the Deloitte Team’s specific experience with CARES, CAA, ARPA, IIJA, and CDBG-DR grants.

CLIENT	PROJECT SUMMARY	ALIGNMENT TO RFP SCOPE OF WORK
Lafayette Consolidated Government	Supporting the <b>grant management services and oversight of ARPA funding</b>	<ul style="list-style-type: none"> <li>- Providing <b>eligibility assessments of potential capital projects</b> to mitigate against future fund claw backs</li> <li>- Supporting quarterly reporting compliance, calculation of lost revenue figures on an annual basis, grant governance and oversight design</li> <li>- Bolstering the existing construction management capabilities of LCG’s Public Works Division.</li> <li>- Assisting in the entire grants management lifecycle including, procurement and Procedure compliance, eligibility review, and cost tracking services</li> <li>- Providing construction oversight support with the Public Works Division including preparing and presenting program status analyses, providing constructability assessments, and drawing review, conducting site-visits to monitor project status, and supporting Davis Bacon wage compliance and reporting</li> </ul>
State of Louisiana	Developed the State’s grant administration infrastructure and performing compliance reviews, reconciliations, subrecipient technical and audit support, and grant closeout for <b>\$18 billion</b> in federal grants from Hurricane Katrina to <b>COVID-19</b>	<ul style="list-style-type: none"> <li>- Established the grant management infrastructure to <b>manage over \$19B in FEMA grants</b></li> <li>- Processing requests from reimbursements from over 1000 subrecipients (state/local agencies) and providing one-on-one <b>technical advice</b> and assistance to <b>34 subrecipients</b> across the State</li> <li>- Designed and implemented a subrecipient monitoring program and <b>Quarterly Reporting process for federal filings</b> and associated controls</li> <li>- Helped <b>track and reconcile</b> billions in federal grants across federal and state systems</li> <li>- Executing the State’s grant closeout process reconciling millions of grant expenditures over 15 years</li> </ul>
St. John the Baptist Parish Government (“SJBP”)	Provided <b>Grant Audit Remediation Support and Appeals justification</b>	<ul style="list-style-type: none"> <li>- Supported and reviewed ~\$1M in costs questioned after an Office of Inspector General audit of Hurricane Ike expenses</li> <li>- Trained Parish personnel regarding the creation and maintenance of compliance documentation</li> <li>- Substantiated majority of questioned funds and pursued additional reimbursement of expenses not previously submitted, as well as positioned them for effective program fund closeout</li> </ul>
State of North Dakota	Implemented Process & Technology for Emergency Rental Assistance Program under <b>CARES and ARPA</b>	<ul style="list-style-type: none"> <li>- Assisted with program and technology design and administration</li> <li>- Provided Contact Center Support to take grant subrecipient calls and respond to questions on funding opportunities</li> <li>- Performance and Financial reporting of grant expenditure</li> <li>- Compliance and program integrity support</li> </ul>
Arkansas Department of Transformation and Shared Services	Develop <b>IIJA strategic analysis report</b> , action plan, communications and engagement strategy, and risk analysis	<ul style="list-style-type: none"> <li>- Develop a methodology to assist in further <b>identifying and prioritizing projects across the State in accordance with Administration initiatives</b></li> <li>- Develop a framework and standards to track risks and issues, both at the program level and across the entire Statewide IIJA initiative</li> <li>- Provide a communication plan to initiate and support community partnerships and engagement as well as inform principals of progress on strategic goals</li> <li>- Recommend options for fraud and internal controls to be used for <b>monitoring IIJA initiatives based on best practices.</b></li> </ul>
New York State Division of Budget	<b>IIJA funds management, strategy, and coordination</b>	<p>Strategy development and recommendations to maximize utilization of <b>IIJA funding</b></p> <ul style="list-style-type: none"> <li>- Support NYS in developing and implementing a methodology to identify and prioritize State and local projects in accordance with State strategic investments</li> <li>- Identification of new potential investment opportunities</li> <li>- Communication and analysis of federal <b>IIJA guidance</b></li> <li>- Communication and reporting of State progress on <b>IIJA projects</b></li> <li>- Perform technical reviews of selected agency and authority <b>IIJA applications</b></li> <li>- Management of the program as specified in the approved State <b>IIJA strategic plan</b></li> <li>- Track overall IIJA progress across infrastructure portfolios</li> </ul>
City of Houston Disaster Recovery Financial Services	<b>CDBG-DR</b> forecast modeling, reporting, and support	<p>Provided disaster recovery financial services including reporting, and support services to assist the City’s financial planning and management in response to the substantial federally-declared disaster, Hurricane Harvey</p> <ul style="list-style-type: none"> <li>-Developed financial models in order to provide the City with timely and reliable forecasts in the absence of comparable historical and operational data</li> <li>-Developed various reports to <b>collate and track financial, operational, and grant management metrics</b></li> <li>-Helped increase interdepartmental transparency, provide <b>monitoring</b> of progress and bring to attention new financial challenges facing the recovery effort</li> <li>-Developed cost reasonableness analyses to help with procurement</li> <li>-Helped prepare the City for <b>compliance assessments</b> to help with future <b>audits</b></li> </ul>
Commonwealth of Puerto Rico	Provided FEMA, CARES Act and <b>ARPA Compliance</b> support and Administration	<ul style="list-style-type: none"> <li>- Provided grants management assistance with FEMA grant closeout for approximately \$20B in federal recovery funding related to Hurricanes Irma and Maria</li> <li>- Performed financial and data management as well as compliance monitoring and closeout support for <b>\$2.2B of Coronavirus Relief Fund</b> across <b>20 programs</b> associated with <b>55+</b> Private and Public Hospitals, <b>78</b> municipalities, and <b>59+</b> governmental agencies</li> <li>- Provided policy insights and guidance to enhance use of eligible funding and promote compliance</li> </ul>
Commonwealth of Virginia Department of Emergency Management	Assist with funding strategy, administration, cost tracking and reporting of COVID-19 relief funds	<ul style="list-style-type: none"> <li>- Provide strategic advice regarding multiple funding streams available for pandemic response.</li> <li>- Assist the Governor with aligning recovery priorities and implement social and economic recovery programs for Virginians. <b>(Equity considerations applicable for ARPA requirements)</b></li> <li>- Grant compliance assistance including reporting associated with vaccine, testing, and other critical response-based metrics.</li> <li>- <b>Tracking</b> of costs associated with FEMA, CDC, and <b>Department of Treasury CRF.</b></li> </ul>

<p>State of Illinois</p>	<p>Deliver an integrated IT platform across the Finance and Procurement Process areas to enhance financial transparency, <b>COVID-19 expenditure tracking</b> and compliance with applicable laws and regulations</p>	<ul style="list-style-type: none"> <li>- Implemented COVID-19 expenditure tracking mechanism into the statewide ERP system to facilitate reporting COVID-19 related expenses</li> <li>- Consolidated ~400 legacy IT systems and 120+ redundant processes leading to streamlined system maintenance and lower total cost of ownership</li> <li>- Stood up support portal and call center in under 24 hours to support transition to work from home due to COVID-19</li> <li>- Enabled management of over \$1B in assets now within SAP and \$10B+ annually in invoices processed</li> </ul>
<p>Sacramento County</p>	<p>End to end administration of grant funds authorized under American Rescue Plan Act (<b>ARPA</b>)</p>	<ul style="list-style-type: none"> <li>- Advised and assisted with the design and management of grant processes associated with ARPA and defined priorities within the allowable use of the recovery funds</li> <li>- Briefed Board of supervisors on updates and changes to guidance and impact to programs</li> <li>- Compiled an inventory of funding opportunities and provided guidance on the implications of the funding streams, timelines, eligibility requirements, and decision-making criteria.</li> <li>- Developed strategies to utilize multiple funding sources including federal, state, and local sources and monitored and tracked the distribution funds and supported County communications, and articulated recovery vision, mission, goals, and strategy. This included building an expenditure transparency report and supported the filing of federal reports (i.e., quarterly)</li> </ul>
<p>St. Louis County</p>	<p>Developed <b>funding strategy</b>, forecasts, and budgets for CARES and <b>ARPA expenditures</b></p>	<ul style="list-style-type: none"> <li>- Budgeted and forecasted expenditure for COVID-19 relief programs</li> <li>- Advised and assisted with COVID-19 grant management, including grant <b>Funding Eligibility Analysis</b>, required reporting documentation for grant coverage</li> <li>- Leverage <b>Deloitte's Funding Inventory</b> tool to <b>increase eligibility</b> of planned project costs and monitored funding, inventory sources and aggregation of project requests</li> <li>- Built a <b>transparency portal</b> to share CRF funding statuses with the <b>public</b></li> <li>- Strategized and planned expenditures based on County priorities- Managed and tracked expenditure through a centralized grant managements process.</li> <li>- Performing monitoring, completeness checks and compliance reviews for various funding sources including Municipality Relief programs (<b>88 municipalities</b>), Small Business Relief programs (<b>+1600 beneficiaries</b>), humanitarian efforts (<b>+170 subrecipients</b>), and healthcare programs (<b>+50 subrecipients</b>).</li> </ul>
<p>State of Nebraska</p>	<p>Administered and managed compliance and reporting for:  <i>a) 1.083B+ in CARES Act Coronavirus Relief Funds (CRF)</i>  <i>b) \$158.6M allocated for the Emergency Rental Assistance Program Coronavirus Aid, Relief, and Economic Security (CARES) Act CARES Act Funding administration, compliance, and Reporting</i></p>	<ul style="list-style-type: none"> <li>- Developed standard operating procedures to enable the application and reimbursement of CARES Act Funding.</li> <li>- Prepared public facing progress and financial reports to provide accountability and transparency</li> <li>- Generated regulatory reports to the US Department of Treasury.</li> <li>- Coordinated with numerous state agencies and the Governor's Office to administer over \$1.083 B in CRF</li> <li>- Managed data, data entry, and analytics platform for Medicaid and Long-Term Care.</li> <li>- Designed and established the State's rental assistance program authorized under the CARES Act</li> <li>- Provided call center support to answer policy related questions and offer case management services</li> <li>- Reviewed contract, procurement, and grant related documents and tracked payments, transactions, and reviewed receipts of federal funds received</li> <li>- Provided compliance monitoring, closeout support, data analytics, and reporting services</li> </ul>

## Alignment of our Experiences with the Requested Scope of Services

The matrix below highlights the examples of our previous projects and some additional representative clients aligned to the major themes of deliverables/services that we have extracted from the RFP. In addition to the detailed descriptions in the Firm Experience portion of the References section, the table below is intended to provide a quick reference of how our experience aligns with the specific needs of the Jefferson Parish Government.

Project Name	Grant Program Design	Funding Source: CARES/ARPA/IIJA/CAA/CDBG	Cost Tracking and Reconciliations	Compliance Reviews	Grant Reimbursement	Grant Funding Strategy/Research/Writing	Training &/or Grant Guidance	Federal Grant Reporting	Subrecipient Monitoring	Audit support	Grant Closeout
State of Louisiana	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
Lafayette Consolidated Government	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
St. John the Baptist Parish Government ("SJB")			✓	✓	✓	✓	✓			✓	✓
Sacramento County	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Arkansas Department of Transformation and Shared Services	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
New York State Division of Budget	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
State of West Virginia	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cobb County, GA	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
St. Louis County	✓	✓	✓	✓	✓	✓	✓		✓		
State of North Dakota	✓	✓	✓	✓	✓		✓	✓	✓		
State of Nebraska	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Commonwealth of Puerto Rico	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Commonwealth of Virginia	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Douglas County, Nebraska	✓	✓	✓	✓	✓	✓	✓	✓			✓
State of Colorado, Division of HS and EM (DHSEM)	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
Texas Comptroller of Public Accounts			✓	✓	✓			✓	✓	✓	
Lamar University			✓	✓	✓	✓	✓	✓		✓	✓
Texas Division of Emergency Management (TDEM)	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
State PA Grant Administration + Mgmt for Hurricane Harvey and COVID-19		✓	✓	✓	✓	✓	✓	✓	✓	✓	
State of New York	✓	✓	✓	✓	✓	✓	✓	✓			
District of Columbia	✓	✓	✓	✓	✓	✓	✓	✓			
City of Houston		✓	✓			✓	✓	✓		✓	
City of Joplin, Missouri			✓	✓	✓			✓		✓	✓
City of San Marcos, Texas	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
State of Illinois			✓					✓			

## Listing of Grant Applications

Per the requirements of the RFP, we have provided a **listing of grant applications completed, grant award amounts, and the entities assisted**. As a global firm with over 100,000 employees serving thousands of private, public, and non-profit entities in the U.S. and abroad, Deloitte has supported the development, submission and administration of thousands of grant applications, including those detailed in the section above. Therefore, in compliance with the detail requested in the RFP, the table below represents grants within the State of Louisiana that we have assisted in applying for over the past two years.

Entities Assisted	Grant Application/Project Name	Grant Award Amount
<b>Bogalusa Waterworks</b>	Emergency Project Bogue Lusa	\$ 52,298.68
<b>Caldwell Parish Sheriff's Office</b>	CAT B-Emergency Protective measures	\$ 13,004.00
<b>City of Alexandria</b>	Citywide Debris Removal	\$ 3,829,118.37
<b>City of Gretna</b>	Debris Removal City Wide Emergency Protective Measures City Wide	\$ 1,938,128.88
<b>City of Harahan</b>	City of Harahan - Emergency Protective Measures - Meals and Ice City of Harahan - Emergency Protective Measures - Mold and Asbestos Remediation City of Harahan - Emergency Protective Measures - Stabilization and Remediation City of Harahan - Temporary Housing Harahan, City of - ROW City Wide	\$ 2,777,069.38
<b>City of Kenner</b>	Citywide Debris Removal Debris Removal	\$ 6,457,857.35
<b>City of West Monroe</b>	APP CERT - Emergency Protective Measures APP CERT - Parks in West Monroe Debris Removal Parish Wide WM Welcome Sign	\$ 494,185.64
<b>City of Winnfield</b>	City Traffic Signal Damage Citywide Municipal Sewer Damages City of Winnfield City Hall City of Winnfield Recreation Facilities Citywide Municipal Electric Grid Damage Emergency Protective Measures - Tree Trimming Citywide Debris Removal Other City of Winnfield Buildings	\$ 1,276,035.31
<b>Department of Children and Family Services</b>	Delta Mass Care Support Hurricane Laura Mass Care Support HURRICANE LAURA MASS CARE SUPPORT	\$ 8,141,728.47
<b>England Economic</b>	Emergency Protective Measures Uninsured Commercial Buildings	\$ 687,479.74

	Apartment Buildings -Cedar, Hickory and Maple Courts Commercial Buildings-Section # 1 Fire Station Building Districtwide Debris Removal	\$ 790,704.23
<b>Grant Parish School Board</b>	Colfax Elementary - Clean and Sanitize Colfax Elementary Temporary Classroom Expenses Grant Jr HS - Building Dmg Montgomery High School - Clean and Sanitize Montgomery HS - Awning, Fence, Sign and Football Field Lights Pollock ES, Main Bldg. 4th grade wing Temporary Facilities Verda ES - Fence around Oxidation Pond	\$ 173,448.03
<b>Grant Parish Sheriff's Department</b>	Emergency Protective Measures EPM Grant Parish Sheriff's Department	\$ 8,474.00
<b>Housing Authority of Jefferson Parish</b>	Temporary roof leak repairs for 10 Buildings - Housing Authority of Jefferson Parish	\$ 144,478.32
<b>JCFA</b>	JCFA-East (3410 Jefferson Highway) and JCFA-West (2106 Deerfield) JCFA-Main (875 Manhattan Blvd.)	\$ 640,777.69
<b>Jefferson Parish Sheriff's Office</b>	Emergency Protective Measures - Generators Mold Remediation Multiple Locations	\$ 15,502.46
<b>Jena Band of Choctaw Indians</b>	Emergency Protective Measures	\$ 60,880.85
<b>John Curtis Christian Schools</b>	JCCS Debris Removal	\$ 19,006,792.16
<b>Lafayette Consolidated Government</b>	Herbert Municipal Golf Course LPCG Buildings Completed 1 LPCG Buildings Completed 2 LPCG Parks Complete 1 LPCG Parks Complete 2 Lafayette Parish Consolidated Government - Cit Lafayette Utilities System - EPM Lafayette Utilities System - Permanent Repairs LPCG - Debris Removal 2 LPCG - Management Costs LPCG Parks to be Completed LPCG-Buildings with Work 100% Completed LUS Fiber - Permanent Repairs LUS Fiber - EPM Management Costs Lafayette Utilities Systems - EPM	

	Public Safety & Public Works - EPM Citywide Debris Removal (10.14.20) Public Safety and Public Works - EPM City Wide Debris Removal Parish Wide - Debris Removal Public Safety & Public Works - EPM		
		\$	246,529.26
<b>LaSalle Parish School Board</b>	Emergency Protective Measures LaSalle Spoiled Food Management Costs Mold and Asbestos Cleaning Jena High School Girls Gym Roof and/or HVAC Repairs Jena Jr High, Goodpine Middle, Jena Elem and More Schools All Complete		
		\$	23,170.50
<b>Morehouse Parish School Board</b>	Delta & Bastrop HS Roof Repairs		
		\$	1,309,511.84
<b>Plaquemines Parish School Board</b>	Emergency Protective Measures - PP School District Wide PPSB EPM		
		\$	138,555.31
<b>Plaquemines Parish Sheriff's Office</b>	Regions Building (Administrative Building) Myrtle Grove Range Training Facility (Shooting Range), Riser Back-flow House Plaquemines Parish Sheriffs Office - Grounds of Facility Plaquemines Parish Sheriffs Office - Grounds of Facility & Road Repair		
		\$	5,195,886.14
<b>Rapides Parish School Board</b>	District # 3 Building Repairs District 2 and 3 Building Repairs -Districtwide Food Spoilage Central Business Administration - Bus Damage District #1 Building Repairs District #4 Building Repairs District 1 Building Repairs District 4 Building Repairs District Wide Miscellaneous Building Repairs Mary Goff Elementary School Mary Goff Elementary School-Roof and Canopy Repairs Districtwide Debris Removal Districtwide Mold Remediation Districtwide Temp Roof Repairs RPSB- District wide Emergency Protective Measures		
		\$	67,742.80
<b>Rapides Parish Sheriff</b>	Emergency Protective Measures EPM project submission Rapides Parish Sheriff		
		\$	156,724.78
<b>Town of Ball</b>	Gayle Lane Sewer plant buildings and Wanda trail Lift Station weather-head Playground Awning and Walking Trail Gazebo and Santa House		

	Town Hall and Campbell Lift Station Fence Emergency Protective Measures Debris Removal Parish Wide		
<b>Varnado Waterworks</b>		\$	<b>45,384.36</b>
	Hurricane Ida Emergency Protective Measures		
<b>Village of Gilbert</b>		\$	<b>55,606.41</b>
	Village wide emergency debris removal from roads		
		\$	<b>7,391,744.53</b>
<b>Washington Parish</b>	Washington Parish - Emergency Protective Measures Mosquito Abatement Washington Parish Washington Parish ROW Debris Removal		
		\$	<b>44,649.46</b>
<b>Washington Parish School System</b>	School Park Washington Parish School System - Debris Removal		
		\$	<b>69,435.15</b>
<b>Washington-St. Tammany Electric Cooperative</b>	Disposal of Power Line Poles and Conductors Leaners/Hangers 90%		

## Staff Experience

Deloitte delivers **qualified, skilled, and trained professionals** experienced in grant administration, monitoring, tracking and compliance. We have proposed professionals with extensive grant management knowledge across multiple federal grant programs including the **CARES Act, American Rescue Plan Act, Infrastructure Investment and Jobs Act, CDBG-DR, and more.**

Per the requirements of the RFP, we have provided short bios, which include any applicable **certifications or trainings**, of the **key personnel** that we are proposing as our Core Delivery Team. **Detailed resumes** for our Core Delivery Team can be found in **Appendix A – Resumes**. Based on staff availability, a broad staff pool has been provided in the **personnel matrix** that follows to show the **depth of resources** that Deloitte can provide to Jefferson Parish for the staff level positions such as Project Analyst/Consultant, Audit Specialist, and Clerical Support. These resumes can be provided upon request.

## PRINCIPALS



**Ragini Roy Basu**  
 Deloitte & Touche LLP  
**Contract Lead**  
**Certified Risk Manager**

- **Deloitte’s National Crisis and Grants Management Practice Leader** who has led complex FEMA recovery and federal grants management projects for **21+ years**
- Established federal grant and related infrastructure for Louisiana, Arizona, California, and Texas to administer **over \$30 billion** in grants
- Leads large teams to manage end-to-end grant programs including **reconciliation, compliance, monitoring, and reporting requirements** in a number of states (including TX, CO, and LA), cities, and counties across the nation.



**Jordy Scholhamer**  
 Deloitte & Touche LLP  
**Project Lead**  
**Certified Internal Auditor**  


- **Certified Internal Auditor** with 10+ years of experience providing grant management, federal compliance, and strategy work for grant programs within Louisiana
- Led various financial assessments of grant making organizations fund management capabilities in the governance, scoping, execution, monitoring, and closeout phase of the grant lifecycle
- Successfully leading several ARPA, IIJA, and IRA projects at the State and Local level in Louisiana, including work directly with Louisiana’s infrastructure coordinator

## PROGRAM MANAGERS



**Larry Francioni**  
 Deloitte & Touche LLP  
**Project Management Professional**  


- **Over 5 years** of experience with federal grant programs and possesses in-depth knowledge of **2 CFR and 44 CFR**
- Manages Deloitte’s **Grants Management and Closeout Team** for the State of Louisiana which processed **over 3500 grant reimbursements** and closed **over 1000 grant files**
- In-depth subject matter knowledge of multiple grant programs such as **ARPA, IIJA, and PA**
- Has worked directly with dozens of local grant applicants including **Jefferson Parish, City of Kenner, & City of Gretna**



**Nicholas Karam**  
 Deloitte & Touche LLP  
**Project Management Professional**  


- **Certified Project Management Professional** with 5 years of experience providing grant management for federal grant programs within the State of Louisiana including for the Jefferson Parish Public School System, City of Gretna, and East and West Jefferson Medical Centers
- Possesses in-depth knowledge of various grant programs such as **ARPA, IIJA, and PA**

## FINANCIAL SUBJECT MATTER EXPERTS



**Bobbie Harper**  
Deloitte & Touche LLP

**Certified Public Accountant**

- **Certified Public Accountant** with 3.5 years of experience in federal grants management, compliance, reporting, financial forecasting/dashboarding, and procurement review.
- Identified an **additional \$12M in ARPA lost revenue** funding for **Lafayette Parish** to maximize flexible spending
- **Over 3 years** of experience with federal grants programs
- **Experienced with IIJA**, including incorporating guidelines and regulations to implement grant execution
- Experienced in **financial reconciliation** of multiple grants



**Yara Ibrahim**  
Deloitte & Touche LLP

## A&E SUBJECT MATTER EXPERTS



**Brenda Villarreal**  
Deloitte & Touche LLP

**Project Engineer**

- **Certified Project Engineer** with **over 6 years** of experience in leading complex Construction projects
- Experience with **FEMA** and **IIJA** related Construction projects



**Auguste Boova**  
Deloitte & Touche LLP

- **Over 3 years of Grant Management and project management oversight** experience
- Led and supported the planning and deployment of **\$250m of American Rescue Plan Act (ARPA)**

## ADDITIONAL SUBJECT MATTER ADVISORS



**Damon Armeni**  
Deloitte & Touche LLP

**Grants Policy SMA**

- Experience in developing **comprehensive strategy** for **most efficient use of federal grant dollars** provided by **CARES Act** and **ARPA** in several States and Counties
- Former **Director for Response Policy** on the National Security Council at the **White House**.
- Advised NYS leadership on **rules, regulations, and implementation of 143+ discrete funding streams**.



**Will Booher**  
Deloitte & Touche LLP

**Communications & Community Outreach SMA**



- **Over 10 years** of experience in the emergency management field at the federal, state, and private sector levels processing Grant Closeouts for all sectors
- Has supported Response and Recovery efforts in **all 10 FEMA Regions** and has held senior emergency management positions at both the federal and state levels
- **Former Director of Public Affairs** for the Federal Emergency Management Agency



**Kevin Lane**  
Deloitte & Touche LLP

**Auditing SMA**  
**Certified Internal Auditor**  
**Certified Information Systems Auditor**  
**Certified Fraud Examiner**

- **Over 20 years of professional experience** in advisory services, serving in a variety of leadership and technical roles over the course of his career
- Currently serving government and public services clients throughout the U.S. in **meeting their program integrity, risk, and compliance objectives**, focusing on service offerings associated with **reducing fraud, waste, and abuse**
- Regularly works with industry and professional associations in the delivery of surveys, webinars, public speaking, and other events in support of professionals in the compliance, audit, security, and program integrity communities



**Igor Dabik**  
Deloitte & Touche LLP

**Water & Social Infrastructure SMA**  
**Project Management Professional**

- Serves as a transaction advisor to clients engaging in bidding, funding, financing, and commercial structuring of public-private partnership (P3) investments across all infrastructure sub-classes
- **10 years of experience** in Water & Social Infrastructure P3 Advisor to a Large State University Utilities and Energy Management (UEM) group



**Christa Lopez**  
Deloitte & Touche LLP

**CDBG-DR SMA**  
**Ph.D. - Public Policy**  
**Certified Emergency Manager**

- Former Deputy Director of Community Development and Revitalization at Texas General Land Office for over 5 years responsible for **developing and reviewing grant applications**
- Supervised the administration and implementation of the **first state-led** FEMA funded Direct Housing Mission
- Disaster recovery housing and infrastructure operations oversight resulting from over **\$12 billion in federal funding**



**Christine Daoud**  
Deloitte & Touche LLP

**Construction Management & Oversight SMA**  
**Project Management Professional**  
**Certified Government Financial Manager**

- Christine supports **Lafayette Consolidated Government (LCG)** with its ARPA **program construction oversight** management needs to include planning activities, management oversight of ARPA recipient construction coordination activities, scope/schedule/cost monitoring, progress reporting, project manager coordination.
- Over **12 years of experience** in of real property program management and asset management, and the applicable policy, governance, information technology, and change management to support those solutions



**Shahbaz Niazi**  
Deloitte & Touche LLP

**Financial SMA**  
**Certified Public Accountant**

- **Certified Public Accountant** with 10 years of experience in federal grants management, compliance, and reporting
- Advised State and Local entities across the country to **track and reconcile over \$19 billion** in eligible grant funding
- Developed reconciliation methodologies and **funding strategies** to maximize eligible grant funding for several large State and local entities

Name	Cost Tracking, Accounting, and Reporting Services	Guidance Development (2 CFR, ARPA)	Documents Review	Grant Reimbursement	State of Louisiana Experience	Grant Closeout Support	Audit Support	Project Management Services	Subrecipient Monitoring
Alex Anderson	✓	✓	✓	✓	✓	✓			✓
Alice Wilson	✓	✓	✓	✓	✓	✓			✓
Amy Duy	✓		✓		✓				✓
Ana Forbes	✓	✓	✓	✓	✓	✓	✓	✓	✓
Andres Lewis Ballister	✓		✓		✓			✓	✓
Andrew Hunt	✓		✓	✓	✓			✓	✓
Andrew Kasperek	✓	✓	✓	✓	✓			✓	
Angie Varrecchio	✓	✓	✓	✓	✓	✓		✓	
Anna Watterson					✓	✓	✓		✓
Austin Wilder	✓	✓	✓	✓	✓			✓	
Ben Myers	✓	✓	✓	✓	✓	✓		✓	
Bridget O’Rielly	✓	✓		✓				✓	
Brytnie Miniell	✓	✓	✓	✓	✓			✓	
Carlos Diaz	✓	✓	✓	✓	✓			✓	
Carmelite Dion	✓	✓	✓	✓	✓			✓	
Casey Soberon	✓	✓	✓	✓	✓	✓	✓	✓	✓
Charlie Mink	✓	✓	✓	✓	✓			✓	
Chelsea McKeathen	✓	✓	✓	✓	✓			✓	
Chrystina Cappello	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cole Smioldo	✓	✓	✓	✓	✓	✓		✓	✓
Colin Bielman	✓	✓	✓	✓	✓			✓	
Curtis Outlaw	✓	✓	✓	✓	✓			✓	
Danielle Miller	✓	✓	✓	✓	✓	✓			
Daryl Soo	✓	✓	✓	✓	✓			✓	
David Vasquez	✓	✓	✓	✓	✓	✓	✓	✓	✓
Demi Stratmon	✓	✓	✓	✓	✓			✓	
Donnie F. Mauroner	✓	✓	✓	✓	✓	✓		✓	✓
Eduardo Cancel			✓	✓	✓				
Elizabeth Nathaniel	✓	✓	✓	✓	✓			✓	
Emily Cohen	✓	✓	✓	✓	✓			✓	
Emma Cook	✓	✓	✓	✓	✓			✓	
Evan Walker	✓	✓	✓	✓	✓			✓	
Evelyn Lumish	✓	✓	✓	✓	✓			✓	
Gregory Desrosiers			✓	✓	✓	✓	✓	✓	✓
Haydn Higgins	✓	✓	✓	✓	✓			✓	
Henna Michalek	✓	✓	✓	✓	✓	✓		✓	

Name	Cost Tracking, Accounting, and Reporting Services	Guidance Development (2 CFR, ARPA)	Documents Review	Grant Reimbursement	State of Louisiana Experience	Grant Closeout Support	Audit Support	Project Management Services	Subrecipient Monitoring
Ian Tocher	✓	✓	✓	✓	✓	✓		✓	
Ibrahim Almati	✓	✓	✓	✓	✓	✓		✓	
Inah Hong	✓	✓	✓	✓	✓	✓		✓	
Jake DiCarlo	✓	✓	✓	✓	✓	✓			✓
Janey Bottini	✓	✓	✓	✓	✓			✓	
Jasmine Desrosiers	✓	✓	✓	✓	✓			✓	
Joe Mizener	✓	✓	✓	✓	✓			✓	
John Hand			✓	✓	✓		✓		✓
Jordan Robinson	✓	✓	✓	✓	✓			✓	
Joseph Dupre	✓	✓	✓	✓	✓	✓	✓	✓	
Josh Seideman	✓	✓	✓	✓		✓		✓	
Juan Velez	✓	✓	✓	✓	✓			✓	
Joselyn Gonzalez	✓	✓	✓	✓	✓	✓		✓	✓
Katrina LaCombe	✓	✓	✓	✓	✓	✓		✓	
Kim Pham	✓	✓	✓	✓	✓			✓	
Kimberly Talbert	✓	✓	✓	✓	✓	✓		✓	
Kyle Mancuso	✓	✓	✓	✓	✓	✓	✓	✓	
Lance Malter	✓	✓	✓	✓	✓	✓			
Lauren Gordon	✓	✓	✓	✓	✓			✓	
Linus Akanoh	✓	✓	✓	✓	✓	✓		✓	
Lou Vi	✓	✓	✓	✓	✓			✓	
Mark Blumkin	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mark Wells	✓	✓	✓	✓	✓	✓		✓	
Maryam Kyari	✓	✓	✓	✓	✓	✓		✓	
Megan Mounts	✓	✓	✓	✓	✓			✓	
Meghan Philbin	✓	✓	✓	✓	✓			✓	
Mehul Jain	✓	✓	✓	✓	✓				
Nicholas Gilbert	✓	✓	✓	✓	✓	✓	✓		
Nicole Nettleton	✓	✓	✓	✓	✓	✓		✓	
Padideh Nikouei	✓	✓	✓	✓	✓			✓	
Patrick Samra	✓	✓	✓	✓	✓			✓	
Peter Catrambone	✓	✓	✓	✓	✓			✓	
Philip Anderson	✓	✓	✓	✓	✓			✓	
Prateek Chitranshi	✓	✓	✓	✓	✓			✓	
Priyal Shah	✓	✓	✓	✓	✓		✓	✓	

Name	Cost Tracking, Accounting, and Reporting Services	Guidance Development (2 CFR, ARPA)	Documents Review	Grant Reimbursement	State of Louisiana Experience	Grant Closeout Support	Audit Support	Project Management Services	Subrecipient Monitoring
Quantae' Hegwood	✓	✓	✓	✓	✓			✓	
Rachel Olson	✓	✓	✓	✓	✓			✓	
Raven Charles Houston	✓	✓	✓	✓	✓			✓	✓
Ricardo Fischer	✓	✓	✓	✓	✓			✓	
Rory Ziomek	✓	✓	✓	✓	✓			✓	
Sandra Draper	✓	✓	✓	✓	✓	✓		✓	
Saloni Doshi	✓	✓	✓	✓	✓				
Sasha Reynolds	✓	✓	✓	✓	✓			✓	
Shannon Rano	✓	✓	✓	✓	✓			✓	
Shawn Kilchrist	✓	✓	✓	✓	✓	✓	✓	✓	✓
Shelby Chandler	✓	✓	✓	✓	✓			✓	
Sherilyn Burris	✓	✓	✓	✓	✓	✓		✓	
Stephanie Wade	✓	✓	✓	✓	✓	✓		✓	
Stephen Pratt			✓	✓	✓		✓		✓
Theron Hotchkiss	✓	✓	✓	✓	✓			✓	
Tim Capasso					✓		✓		✓
Tonya Edwards	✓	✓	✓	✓	✓	✓		✓	
Zein Jivani	✓	✓	✓	✓	✓	✓	✓		

**\*Staff Resumes Are Available Upon Request\***

## Firm Experience (References)

Past Performance 1	
<b>Project Title</b>	Lafayette Consolidated Government
<b>Years of Project</b>	2022 – Present
<b>Specific Contact Information:</b>	<b>Organization Name:</b> Lafayette Consolidated Government <b>Contact Person Name:</b> Mary Sliman <b>Telephone Number:</b> 337-291-8259 <b>Email Address:</b> <a href="mailto:msliman@lafayettela.gov">msliman@lafayettela.gov</a> <b>Fax Number:</b> 337-291-8269
<b>Total Project Value:</b>	<b>\$2.9 Million</b>
<b>Description of Work Performed:</b>	
<p>Deloitte is currently supporting Lafayette Consolidated Government (LCG) with extensive grant management services related to the oversight of State and Local Fiscal Recovery Funds (SLFRF) allocated through the American Rescue Plan Act (ARPA). The services Deloitte is providing include eligibility assessments of potential capital projects to mitigate against future fund claw backs, supporting quarterly reporting compliance, calculation of lost revenue figures on an annual basis, grant governance and oversight design including policies and procedures, and bolstering the existing construction management capabilities of LCG’s Public Works Division. A summary of the full slate of services we are providing include:</p> <p><u>Procurement and Procedure Compliance Services</u>                      Developed a standardized Request for Qualifications (RFQ) template for LCG to reference when procuring architecture engineering (AE) firms to provide design services for projects funded with federal funds. This standardized template aims to reduce the level of effort required by LCG to execute the RFQ process, while minimizing federal noncompliance by documenting necessary federal contracting provisions and identifying scope details that could impact eligibility under Federal Awards.</p> <p>Provided procurement compliance reviews for various complex procurements funded under ARPA. Areas of review include analyzing bid specifications to determine no restrictive language is used, evaluating bidder selection and rejection justification against requirements of 2 CFR 200, reviewing contracts for federal flow down provisions, and documenting challenges and remedial actions associated with Construction Management at Risk (CMAR) procurements when using federal funds.</p> <p>Developed a comprehensive grants policies and procedures manual to enhance intra-departmental coordination and streamline the grants management process within the city-parish. Manual incorporated grants management best practices, 2 CFR 200, detailed grants management checklists for each department, FAQs, folder naming structures for various documents, grant writing resources and RFP samples, etc.</p> <p><u>Eligibility Review Services</u>                      Performing eligibility reviews for each ARPA SLFRF projects to capture the appropriate expenditure category that best aligns with the scope and intent of the project. Each review consists of documenting direct quotes from and references to applicable guidance to facilitate project eligibility substantiation should questions arise from the federal entity to minimize risk of potential de-obligation of funds.</p> <p><u>Cost Tracking, Accounting, and Reporting Services</u>                      Identified an additional \$12 million of funds that could be allocated to the Parish's revenue replacement fund allowance. This new fund category has the most flexible eligible use under ARPA SLFRF and enabled LCG to maximize their use of ARPA funds on priority projects for the consolidated government while being subject to less restrictive reporting requirements associated with those funds.</p> <p>Supported the quarterly reporting process, which included working with various stakeholders across various departments to gather project and expenditure details, including project description, anticipated impact to the community, location, population being served, beneficiary/subrecipient information, contract/subgrant agreement information, and other required factors to facilitate complete, accurate, and timely reporting.</p>	

Trained project managers on ARPA reporting requirements and provided user friendly templates when requesting project information for reporting purposes

Project Management of Construction and Oversight Support

Compiled disparate project information into a single, primary tracker used across LCG to monitor relevant project information, including, but not exclusive to, recommended project expenditure category, project details and status, compliance reporting data, construction risks to timely completion, and hyperlinks to external sources, such as ordinance approvals.

The construction oversight support Deloitte is providing to the Public Works Division includes preparing and presenting program status analyses, providing constructability assessments, drawing review, and conducting site-visits to monitor project status and support Davis Bacon wage compliance and reporting. Deloitte will be supplementing existing, in-house project managers and operated in a construction manager role to maximize project delivery efficiency, reporting compliance, and coordination across various LCG Divisions.

Audit Support

Provided Davis Bacon compliance policy support for applicable projects.

**Past Performance 2**

<b>Project Title</b>	State of Louisiana - GOHSEP
<b>Years of Project</b>	2006 – 2014, 2017-Present
<b>Specific Contact Information:</b>	<p><b>Organization Name:</b> State of Louisiana  <b>Contact Person Name:</b> Lynne Browning, Assistant Deputy Director  <b>Telephone Number:</b> (225) 338-7342  <b>Email Address:</b> lynne.browning@la.gov</p>
<b>Total Project Value:</b>	<b>\$150 Million</b>
<b>Description of Work Performed:</b>	
<p>Deloitte has assisted GOHSEP in complying with federal and state regulations regarding the management and administration of grant funds related to Hurricanes Katrina, Rita, Gustav, Ike, and several other significant disaster events since 2006. Our services include:</p> <ul style="list-style-type: none"> <li>• Providing advice on enhancements to improve the effectiveness and efficiency of their grant management process</li> <li>• Developing and implementing a subrecipient monitoring program and a grant closeout review process</li> <li>• Providing technical advice and grant management assistance to subrecipients regarding maintenance of auditable documentation and support</li> </ul> <p>In 2017, our team served as GOHSEP’s Grant Subrecipient Technical Assistance Team resulting in compliant closure of over 1,019 grant projects in over \$1 Billion of Total Project Cost. This involved monitoring grant subrecipient’s compliance with grant rules and regulations identifying and resolving policy issues, gathering, and compiling supporting documentation, and performing reconciliations to determine the final damage claim and associated grant request.</p> <p>Since 2020-Present, Deloitte is providing GOHSEP with Grant Administration, and Grant Closeout services for 5 major disasters and serves as GOHSEP’s Applicant Assistance and Outreach Team across 150+ disaster grant subrecipients across several grant programs and provides the following services in addition to the ones described above:</p> <ul style="list-style-type: none"> <li>• Process over 150+ grant reimbursement requests and close ~35 grant projects a month</li> <li>• Identify and help resolve issues preventing closeout for open projects.</li> <li>• Prepare and submit grant files to assist in the expedited and timely closeout of high risk subrecipient’s open projects to help GOHSEP meet its closeout goals.</li> <li>• Embedded teams with grant subrecipients to evaluate their compliance and readiness for project closeout and generated Corrective Action Plans</li> <li>• Facilitated trainings of grant subrecipient staff</li> </ul>	

Public Assistance Formulation Team - Deloitte is also providing grant project formulation support to over 45 of GOHSEP’s grant subrecipients related to damages from Hurricane Laura, Ida, Delta, Zeta, and the most recent winter storms. The team supports all phases of formulation, from initial Damage Inventory development through final obligation, quarterly reporting with the State, and the Recovery Transition Meeting. Deloitte provides on-site support to assist in document collection, project scoping, and site inspections. The team serves as the coordinating entity of multiple layers of government and stakeholders. Through collaborative work with the applicants, FEMA, and the State, the team has uncovered eligible expenses, tracked down missing invoices and insurance reports, and identified and developed the analysis needed for mitigation opportunities resulting in additional funding and expedited recovery. Our hands-on support to these public and non-profit agencies has resulted in over \$96 million in identified projects and another \$26 million secured from FEMA of eligible grant funding to date. Through the life of our deployment for GOHSEP, there have been many applicants that have required additional technical assistance, including the City of New Orleans (CNO), State of Louisiana Facility Planning & Control (FP&C), and Plaquemine's Parish. For three of these subrecipients, the Deloitte Strike Team has engaged and provided technical assistance in cost substantiation, project versioning, and cost analysis. These efforts have included drafting position papers to influence FEMA policy in the State (i.e., reducing requirements for procurement of improved projects contents). Our team has played a significant role in pushing over 1,000 projects to closeout for some of Louisiana’s most complex disasters.

Past Performance 3	
<b>Project Title</b>	State of Nebraska- CARES
<b>Years of Project</b>	2020 – Present (1 Year)
<b>Specific Contact Information:</b>	<p><b>Organization Name:</b> State of Nebraska, Military Department and Nebraska Emergency Management Agency</p> <p><b>Contact Person Name:</b> Major General Daryl Bohac</p> <p><b>Telephone Number:</b> (402) 309-8105</p> <p><b>Email Address:</b> daryl.l.bohac.mil@mail.mil</p>
<b>Total Project Value:</b>	<b>Over \$5 Million</b>
<b>Description of Work Performed:</b>	
<p>Deloitte is engaged with the State of Nebraska to develop standard operating procedures for the State to enable the application and reimbursement of CARES Act Funding. Deloitte is currently supporting Douglas County with program administration activities over \$166M in CARES Act Coronavirus Relief Funds and the State of Nebraska’s Military Department, Emergency Management Agency, Health and Human Services Agency, Economic Development Agency, Budget Office, State Accounting Office and the Governor’s Office with program administration activities over \$1.083 B in CARES Act Coronavirus Relief Funds. Deloitte also provided services to the Nebraska Department of Health and Human Services with the implementation of the Data Management and Analytics Platform for Medicaid and Long-Term Care.</p> <p>Deloitte’s Impact in Nebraska:</p> <ul style="list-style-type: none"> <li>• Designed and stood up a rental assistance program, local government program, and a not-for-profit program to provide over \$140M of COVID-19 support from the CARES act to local governments, not-for-profits, and low to moderate income residents.</li> <li>• The cornerstone of Deloitte’s program administration support includes program design; development of program processes, procedures, applications, guidelines and FAQs; use of Deloitte’s technology platforms and contact center agents for call center support as well as our Deloitte GovConnect technology platform utilized by case managers for application intake, reviews, tracking, and payment support; compliance monitoring; program closeouts; and data analytics and reporting to include a public facing site which serves as a single transparency site for program activities. While not all of these services have been requested in this RFP, our team has significant experience with the grant application process, technical assistance through case management, and reporting requirements (both mandatory and secondary) for federal grant programs.</li> <li>• Actively performing subrecipient monitoring and have developed a conceptual design of an integrated process to facilitate intake, review, and approval of funding applications and requests for reimbursement. Additionally, the team has developed public-facing reports to demonstrate accountability and transparency, and helped the State generate and submit regulatory reports to the US Treasury.</li> </ul>	

Past Performance 4	
<b>Project Title</b>	Arkansas Statewide Infrastructure Consulting Services
<b>Years of Project</b>	2022- present
<b>Specific Contact Information:</b>	<b>Organization Name:</b> Arkansas Department of Transformation and Shared Services <b>Contact Person Name:</b> Brandi Schroeder <b>Telephone Number:</b> 501-324-9316 <b>Email Address:</b> <a href="mailto:Brandi.Schroeder@arkansas.gov">Brandi.Schroeder@arkansas.gov</a> <b>Fax Number:</b> 501-319-6528
<b>Total Project Value:</b>	<b>\$2.5 Million</b>
<b>Description of Work Performed:</b>	
<p>Deloitte is currently providing project management and strategy services to maximize the use of the State of Arkansas’ IJJA funds. As part of this work, we provide a review of each policy section outlined in IJJA against current Arkansas initiatives and priorities. In addition to identifying funding opportunities, we provide recommendations to utilize and compete for IJJA funding. In order to maximize the use of IJJA funds, our team is implementing the following strategy:</p> <ul style="list-style-type: none"> <li>• Develop a methodology to assist in further identifying and prioritizing projects across the State in accordance with Administration initiatives and priorities.</li> <li>• Provide a communication plan to initiate and support community partnerships and engagement as well as inform principals of progress on strategic goals and associated metrics.</li> <li>• Coordinate and align initiatives related to IJJA between State agencies.</li> <li>• Recommend options for fraud and internal controls to be used for monitoring IJJA initiatives based on best practices.</li> <li>• Develop a IJJA Strategic Analysis Report and Immediate Action Plan.</li> <li>• Monitor and assist with communication of Federal guidance regarding IJJA application requirements.</li> <li>• Develop a framework and standards to track risks and issues across the entire state-wide IJJA initiative.</li> </ul>	

Past Performance 5	
<b>Project Title</b>	City of Houston Disaster Recovery Financial Services (CDBG-DR)
<b>Years of Project</b>	2019- present
<b>Specific Contact Information:</b>	<b>Organization Name:</b> City of Houston <b>Contact Person Name:</b> Melissa Dubowski <b>Telephone Number:</b> 832-393-9101 <b>Email Address:</b> <a href="mailto:Melissa.Dubowski@houstontx.gov">Melissa.Dubowski@houstontx.gov</a>
<b>Total Project Value:</b>	<b>\$1.5 Million</b>
<b>Description of Work Performed:</b>	
<p>Deloitte was engaged by the City of Houston to provide disaster recovery financial services, including forecast modeling, reporting, and support services to assist with the City’s financial planning and management in response to the substantial federally-declared disaster, Hurricane Harvey. The hurricane caused severe damage to the housing stock and resulted in the largest CDBG-DR grant the City has ever received – totaling \$1.27 billion.</p> <p><u>Building Housing Recovery Financial Models</u></p> <p>The Harvey CDBG-DR grant award (hereby referred to as “DR17”) is almost five times larger than any CDBG-DR grant the City has previously ever managed. Reimbursement based programs bring specific challenges in timing and sourcing the initial program expenditures while driving timely reimbursements and continuing to invest in the City’s future. Deloitte was tasked with forecasting the DR17 cash flows to assist the City in anticipating the substantial cash needs of such a sizeable program.</p>	

Deloitte developed 10 detailed DR17 financial models before all the recovery programs had started in order to provide the City with timely and reliable forecasts in the absence of comparable historical and operational data. The models were developed based on individual sub-program forecasts and assumptions received from the Housing and Community Development Department's (HCDD) staff. They modeled the sub-program specific award targets and their cash flows across various cost categories. This includes project costs for each sub-program, project delivery costs, administrative costs, and planning costs over the life of the program. Due to the lack of consistent historical data, and reliable current systems data, our team demonstrated creativity in creating a solution that integrates all available and relevant data to make short, medium and long-term forecasts. The models were developed to project multiple program spending scenarios based on conservative to aggressive award target goals, and have already assisted the City with:

- Reporting to City Council the forecasts, and current fiscal year and inception-to-date spend of Housing's recovery program. These are published in the Finance Department's monthly and quarterly financial reports
- Projecting monthly cash needs to determine if the City has sufficient cash reserves available to provide liquidity for recovery expenditures
- Perform cost-benefit analysis on additional funding options and debt financing considerations
- Created various dashboarding options to report recovery progress across certain stakeholders, and identified overspending in Administrative spending

#### Enhancing Reporting + Communications

Deloitte integrated the Housing forecast model outputs with Power BI to show additional reporting capabilities available to the City, and developed various reports to collate and track financial, operational, and grant management metrics - including those monitored by the City's DR17 grant agreement with the Texas General Land Office (GLO). By helping to keep a pulse on reporting Deloitte has already helped increase interdepartmental transparency, provide monitoring of progress, and bring to attention new financial challenges facing the recovery effort.

#### Additional Finance + Accounting + Compliance Support

In response to previous audit findings on other recovery programs by the OIG and HUD, the Housing department proactively tasked Deloitte to assist with DR-17 compliance and prepare for future audits. Our team has already performed multiple cost reasonableness analyses and is helping prepare compliance assessment reviews for several DR-17 procurements.

The cost reasonableness analysis required us to prepare cost estimates by averaging the costs of publicly available CDBG contracts with similar scopes of work. These prepared cost estimates then served as a basis for developing a reasonable cost range to be compared against the established range provided by the bidders to determine the reasonableness of each. For the procurement assessments, we have developed an approach to review applicable procurement regulation from federal, state, and local policies to compare procurement documents against. The findings will help us to provide process improvements and recommendations to the City for new procurements going forward.

Deloitte's efforts also helped the City's understand the true source of its recovery spending as the City's cash concentration account. Though there are various departments and multiple department specific bank accounts, there was uncertainty around the source and balance of the final accounts responsible for disbursing the cash used to fund DR-17 program activities. Using facilitated working sessions between departments (FIN, CTR, HCD) that support the cash management activities of the City our team reviewed and documented the City's current spending controls, bank accounts, and reports used by various departments and funds. This helped provide the clarity needed to evaluate the true cash position of the City and be able to budget appropriately.

# E. Innovative Concepts

- Present innovative concepts, if any, not discussed above for consideration.
- Proposer shall include innovative concepts, including any historical experience related to those concepts, that the Proposer desires the Parish to consider

## Innovative Concept 1: Productivity Software

Our team is familiar with a portfolio of software products that are designed to boost our team’s productivity so Jefferson Parish gets more out of less. Our tools can aid in the extraction, aggregation, and batch uploading of supporting documentation including extracting and combining data from multiple legacy systems to then build applicable interfaces.

These capabilities are crucial for efficient compliance reviews of expenditures, payment processing, as well as archiving to meet Federal grant closeout requirements.

Additionally, Deloitte has developed a proprietary **Optical Character Recognition (OCR) tool** embedded within a document aggregation and archiving platform. This platform can expedite the scanning, compilation, analysis, and data aggregation from manually generated expenditure files (such as vendor invoices, bank statements, and manual timecards). This tool has resulted in significant productivity improvement for our teams serving grant compliance projects across the nation.

## Innovative Concept 2: COVID Funding Compliance and Strategy Engine

Our team can help Jefferson Parish build strategies to evaluate funds available, assign funds to a matching funding source, and scenario plan to determine a long-term plan and routes to reimbursement. We will coordinate with staff in identifying Parish departments to obtain costs and required supporting documentation to develop, revise, and submit funding applications. We will assign each identified department a staff person as a primary contact with whom to work. This primary contact will gather required documents and ask follow-up questions as required. In our experience, providing a single point of contact streamlines communications and limits the risk of miscommunication.

We will leverage **Deloitte’s Proprietary COVID Funding Compliance and Strategy Engine** to efficiently assign a specific funding source to each COVID-19, ARPA, and IIJA related expense transaction based on our strategic methodology. The tool performs the following steps:

- ✓ Collects transactional expense line items
- ✓ Evaluates eligibility of costs for reimbursement according to federal regulations
- ✓ Leverages data points such as funding source risk factors, time to fund expiration, fund restrictiveness, etc. to identify an optimal funding source
- ✓ Exports a file for approval or selection of alternate funding source using corresponding dashboard functionality
- ✓ Considers flexibility to account for specific Parish priorities that may shift as federal guidelines change

This approach combines COVID Funding Compliance with the Strategy Engine to quickly align expenses to the optimal eligible funding types available across the various streams under the CARES Act, IIJA, and ARPA and advise the agencies accordingly.





Legend	
	Reports
	Jefferson Parish (JP) Input Needed
	Key Decision Point

Progress reports and key decision points are depicted using the icons in the ‘Legend’ that are overlaid on the timeline presented in the work plan. Additionally, areas where we anticipate staff or management from Jefferson Parish to provide input, decision or approval are also depicted using the icons on the timeline. Detailed descriptions of the legend icons identified on the timeline are provided on the table below. The responsible parties have been identified in the work plan legend below.

Work Plan Legend			
Icon	Work Plan Reference	Type	Responsible Party and Related Activities
★	1.1	Key Decision Point	Finalize Parish goals and plans to develop preliminary funding matrix
🗨️★	1.3	JP Input Needed /Key Decision Point	Parish officials to provide Deloitte with project requests to aggregate and help determine project prioritization
📄	2.1	Reports	Deloitte will provide the Parish with report on grant opportunities best aligned with prioritized projects
📄	3.1	Reports	Deloitte will preform Lost Revenue Calculation and share results will Parish officials
🗨️	3.3	JP Input Needed	Parish officials to provide Deloitte with current policies and procedures documentation
📄	4.1	Reports	Progress reports and dashboards to be provided by Deloitte
🗨️	4.2	JP Input Needed	Jefferson Parish and it's staff will be responsible for implementing the corrective actions identified in Deloitte's compliance review
🗨️	4.3	JP Input Needed	Parish Officials to provide relevant subrecipient data in order for Deloitte to perform a risk analysis
📄	4.4	Reports	Detailed Subrecipient Risk Analysis to be provided by Deloitte
🗨️	5.1	JP Input Needed	Jefferson Parish to provide Deloitte with details of the Parish's current financial tracking capabilities
📄	5.2	Reports	Custom progress reports on contract performance to meet federal requirements provided by Deloitte
🗨️	7.2	JP Input Needed	Jefferson Parish will be expected to collaborate with Deloitte to provide physical and electronic access to supporting documentation to facilitate reviews

## G. Financial Profile

*Proposers are requested to submit documentation from the past three (3) years demonstrating proposer's financial stability. Documentation may include audited financial statements including balance sheets, income statements, documentation regarding retained earnings, assets, liabilities, etc. Such information should be included in the technical portion of the proposal submission and MUST NOT be included with the cost proposals and/or price schedules.*

Deloitte LLP is a strong, viable organization; Deloitte LLP and its predecessor firms have been in business continuously for 176 years. We have the financial resources to serve clients as we always have—with top talent and in-depth technical resources. Our organization anticipates no forthcoming changes in ownership or structure

The fiscal year 2022 revenues for DTTL member firms, including their affiliates, were approximately \$59.3 billion. Fiscal year 2022 revenues for Deloitte LLP, the U.S. member firm of DTTL, were \$27.9 billion. Deloitte LLP has controls in place to minimize our exposure to potential liability and to minimize financial risk. Deloitte LLP and its predecessor firms have been in business continuously for more than 175 years. The firm's solid financial condition is reflected in:

- A strong balance sheet
- The maximum insurance protection available
- Adequate provision for uninsured risk

Deloitte LLP is a strong, viable organization. We have financial resources to serve clients as we always have—with top talent and in-depth technical resources. Detailed information regarding Deloitte LLP in the U.S. is provided in the chart below:

<b>Deloitte LLP and Subsidiaries— By The Numbers</b>				
<b>U.S. Firms</b>	<b>2022</b>	<b>2021</b>	<b>2020</b>	
<b>(\$ U.S. billions)</b>				
Offices (national and regional)	129	126	126	
People	156,397	121,693	113,257	
Consolidated Revenues	<u>\$ 27.9</u>	<u>\$ 22.9</u>	<u>\$ 23.2</u>	
Current Assets	\$ 10.0	\$ 11.0	\$ 8.6	
Other Assets	<u>8.2</u>	<u>8.0</u>	<u>8.0</u>	
Total Assets	<u>\$ 18.2</u>	<u>\$ 19.0</u>	<u>\$ 16.6</u>	
Current Liabilities	\$ 7.5	\$ 7.4	\$ 5.7	
Other Liabilities	4.3	5.1	5.6	
Partnership Equity	<u>6.4</u>	<u>6.5</u>	<u>5.3</u>	
Total Liabilities and Partnership Equity	<u>\$ 18.2</u>	<u>\$ 19.0</u>	<u>\$ 16.6</u>	
Working Capital	\$ 2.4	\$ 3.6	\$ 2.9	
Current Ratio	1.3:1	1.5:1	1.5:1	
<b>Consolidated Revenue By Business</b>				
Audit and Risk Advisory Services	27.9%	28.0%	27.2%	
Consulting	54.0%	52.5%	52.2%	
Financial Advisory Services	3.1%	3.4%	3.4%	
Tax	15.0%	16.1%	17.2%	
<i>Source: Deloitte LLP, New York</i>				

*The above financial information was prepared for internal purposes. This financial information has not been audited and does not present the financial position, results of operations, or other financial information in accordance with generally accepted accounting principles. The use of this information is restricted to your consideration in providing you professional services. Any other use or circulation of this information is prohibited*

# Appendix A - Resumes

## Ragini Roy Basu

As Deloitte's National Crisis and Grants Practice Leader, Ragini has over 21 years of experience in crisis recovery and federal disaster grants management and has a reputation for leading some of the largest and most complex recovery projects in the country. Ragini focuses on enabling client organizations to efficiently set up and effectively administer federal programs requiring timely distribution of funds, compliance monitoring, and reporting of program activities in accordance with federal program regulations. Ragini has significant experience in creating monitoring programs in Arizona, Texas, Louisiana, Colorado specially around, education and energy grants, Cares Act, FEMA's Public Assistance, and HUD's CDBG-DR programs and helps our clients develop sustainability and resiliency into their organizations. engagement leader.



### EXPERIENCE IN THE INDUSTRY

Ragini has vast experience working in areas of disaster recovery, grant management, American Infrastructure Grants funded projects, organizational transformation, managing public assistance engagements, hazard mitigation engagements, finance transformation, and performing internal, financial, and operational audits. Ragini has been involved in helping clients with multibillion-dollar natural disasters, and successfully led and managed disaster recovery projects. Ragini has demonstrated capabilities to help organizations efficiently set up and effectively administer large and complex programs. She has significant experience in helping clients respond and recover from large-scale crisis events and build resiliency into their organizations. Leads large teams to manage end to end grant programs including, reconciliation, compliance, monitoring, and reporting requirements at a number of states including TX, CO, PA, WV and LA and multiple cities and counties in the nation.

### EDUCATION AND TRAINING

Bachelor of Business Administration, Accounting and Internal Audit, Louisiana State University

### SELECTED EXPERIENCE

#### Lafayette Consolidated Government (LCG), State of Louisiana

- ✓ Ragini serves as the lead engagement principal managing LCG's ARPA grant funding which includes the scope of services in the span from Grants Strategy, Program administration, Compliance reviews, dashboarding, development of policies and procedures, construction compliance reviews and construction management activities as well as procurement reviews, eligibility determinations, reporting support, and audit compliance.

#### Pennsylvania Department of Education (PDE), State of Pennsylvania

- ✓ Ragini serves as the lead engagement principal helping the agency manage and monitor over \$7.7B of ESSER grant funding. The scope of services includes creating a risk-based program to include a customized risk assessment, monitoring plan, communication protocol to include a pilot and a comprehensive execution of the program that was designed and stood up for approximately three years of the program.

#### Governors Office of Homeland Security and Emergency Preparedness (GOHSEP), State of Louisiana

Ragini has served GOHSEP since 2006 and has served as the lead engagement principal for the last six years spanning a number of key strategic initiatives to include:

- ✓ Leading engagements team totally 100+ individuals across the setting up and deploying strike teams for high risk subrecipients, managing a core team to assist the state in grants management and closeout activities as well and leading multiple teams on a national MSA and serving as a Project Manager with over 40 subrecipients with local governments, agencies, and not-for-profits.
- ✓ Lead an agency wide risk-based assessment of current state capabilities of the organization related to the people, process, and technology components following Hurricane Katrina.
- ✓ Designed and supported the creation and implementation of a risk assessment to assist the organization in evaluating its subrecipients in developing a monitoring strategy. Created monitoring templates to facilitate desk reviews of A-133 reports and subrecipient site visits. In addition, led the design and implementation of a sanctions and appeals program.

- ✓ Designed an expense review tool to automate and enhance the grant manager's review of over \$14B expense reimbursement requests for claims processing for disaster related claims.
- ✓ Performed a data analysis exercise to identify data integrity issues and subsequently developed a tool, procedures, and a template to facilitate the reconciliation of a \$14B transactions related to federal programs.
- ✓ Designed an insurance tracking and compliance system to better manage insurance considerations for Grant Managers in managing a PA disaster.

### **Division of Homeland Security and Emergency Management (DHSEM), State of Colorado**

- ✓ Served the State of Colorado's Division of Homeland Security and Emergency Management as the Lead Engagement Principal. Helped the client design a strategic plan and business processes over their PA program for expense reimbursement, payment reconciliation, subrecipient monitoring, project formulation, and closeout.
- ✓ Helped implement a disaster grant management system to configure and customize the solution to meet the needs of the states.
- ✓ Advised the State on audit readiness and helped facilitates conversations with FEMA and other third parties.

### **City of Houston, State of Texas**

- ✓ Helped the client understand the major financial risks, opportunities, and costs related to Hurricane Harvey recovery ranging from financial forecasting, procurement and compliance reviews as well as serving as an advisor for all general grants advisor to include ARPA loss revenue analysis and other special projects.
- ✓ Lead teams to evaluate the costs and benefits of various short- and long-term recovery funding sources, project and monitor recovery cash flow and financial impacts, maximize state and federal reimbursements, and minimize funding delays and potential losses.
- ✓ Provides frequent financial performance reporting and recommendations to City leadership (City Council & Mayor's Office)

### **Texas Division of Emergency Management (TDEM), State of Texas (Austin), Quality Assurance Reviewer**

- ✓ Serves as the Quality Advisor on a team to provide disaster recovery grant administration and compliance monitoring services for full life cycle grant administration activities related for the State of Texas Department of Public Safety (DPS) and TDEM.
- ✓ Conducts quality assurance reviews on the deliverables and monitor project quality and progress. Provide feedback on any findings or recommendations to the Engagement Leader on compliance with Deloitte's quality framework.
- ✓ Visits the project site to meet key client stakeholders and perform client satisfaction assessments.

### **Texas State University System**

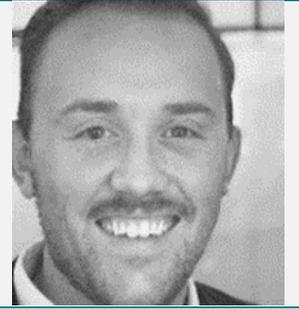
- ✓ Led two projects for the Texas State University System to evaluate the client's processes to effectively comply with federal and state regulations over Public Assistance (PA) funds available to them.
- ✓ Led the development of Disaster Recovery and Management Policies and Procedures for the Systems offices and campuses as a part of an audit readiness project to better prepare them for future disasters and related audits

### **Governor's Office of Economic Recovery (GOER), State of Arizona**

- ✓ Developed the subrecipient monitoring plan for the State of Arizona that passed through federal stimulus funding under the ARRA program and was invited to present the National Governors Association to present on a compliance framework and strategy for all 50 states.

## Jordy Scholhamer

Jordy is a Senior Manager from New Orleans Louisiana focused on delivering Crisis and Grant Management strategy and support services. With over 11 years of experience working with State, Local, Higher Education, Non-Profit and certain Commercial entities in the grant management, grant strategy and emergency management space, Jordy has a demonstrated track record delivering results for Deloitte clients.



### EXPERIENCE IN THE INDUSTRY

Jordy has managed various assessments of grant making organizations fund management capabilities in the pre-award governance, scoping, execution, monitoring, and closeout phases of the grant lifecycle. Jordy currently leads Disaster Recovery grant management and American Rescue Plan Act strategy services for over 30 local governments, school boards, sheriff's departments, and non-profits in the State of Louisiana.

**Grant Strategy** – Supporting clients in identifying community needs and aligning needs with business processes and controls to budget funding, build awareness of opportunities, evaluate potential grant opportunities, and manage awards through closeout.

**COVID Stimulus Grants** – Working with State and Local clients to manage large stimulus grants including the CARES Act, American Rescue Plan, and Joint Infrastructure Bill.

**2 CFR Uniform Grant Guidance** – Outside of FEMA programs, Jordy has spent significant time advising clients on the administrative requirements, cost principles, and audit requirements related to Federal funding programs. Applicable across all Federal grant programs, this has included the development of comprehensive monitoring programs for numerous funding streams

**Financial Reconciliation and Data Analysis** – Jordy has significant experience using data sets to inform decision making at all levels of government.

**Strategy and Operations Design** – Jordy has a track record of helping clients identify strategic priorities, prioritize demands and resource constraints, refine responsibilities for execution, and design processes, policies and procedures to enable clients to reach their financial and operational objectives

### EDUCATION AND TRAINING

Bachelor of Arts in Accounting, Louisiana State University

Certified Internal Auditor

### SELECTED EXPERIENCE

#### Lafayette Consolidated Government (LCG)

- ✓ Leading efforts with the Parish and City to identify, prioritize, and execute various projects utilizing State and Local Fiscal Recovery Funds from the American Rescue Plan
- ✓ Providing technical guidance on grant compliance, procurement requirements, and contracting
- ✓ Supporting the filing of Federally mandated grant reporting with the US Treasury
- ✓ Establishing new policies and procedures for adoption across various departments to aid in the identification of, application for, receipt of, management of and closure of Federal Grant programs
- ✓ Designing reporting capabilities to monitor, track, and communicate progress to external stakeholders including through forums such as Town Hall events
- ✓ Coordinating efforts for construction management oversight with Public Works department to ensure timely delivery of projects

#### Louisiana Division of Administration (DOA)

- ✓ Leading efforts with the Division of Administration and State Infrastructure coordinator on developing State strategy for securing IJA and IRA grant opportunities for Louisiana agencies and governments
- ✓ Coordinating with various state agencies and providing technical assistance on grant management topics

#### Pennsylvania Department of Education (PDE)

- ✓ Serving as an advisor on the implementation of a monitoring program for \$7.7B in ESSER grant funding
- ✓ Designing and advising on risk assessment protocol for managing 800 subrecipients
- ✓ Crafting monitoring protocol to fulfill requirements for on-site and virtual compliance reviews
- ✓ Drafting communications to aid in program rollout

### **FEMA PA, GOHSEP, State of Louisiana**

- ✓ Leading a team of over 70 professionals performing closeout and grant management functions for legacy disasters including Hurricanes Katrina, Rita, Gustav, Ike, and several flooding events in 2016
- ✓ Engaging with over 100 local entities to discuss closeout process, reconcile final claims on long-standing projects, escalate challenges and potential resolutions to FEMA and GOHESP leadership, and support efforts of the **“STRIKE” Teams including the team that engaged with Jefferson Parish in 2019 on behalf of GOHSEP to close legacy projects**
- ✓ Leading a separate team of 15 professionals providing project formulation support for Hurricanes Laura, Delta, Zeta, and Ida to over 50 local governments in various parishes and State agencies throughout Louisiana
- ✓ From 2011-2014, supported the implementation of various programs and technology solutions

### **Department of Homeland Security & Emergency Management (DHSEM), State of Colorado**

- ✓ Designed a consolidated, 2 CFR compliance, Subrecipient Monitoring program for 14 Federal Grant programs
- ✓ Led a team of individuals in executing over 50 site visits throughout the State

### **Deloitte Greenhouse Strategy Labs**

- ✓ Designed and facilitated multiple strategy labs for commercial and public clients including transition labs for Chief Financial Officers, University Provosts, and Chief Executive Officers amongst others
- ✓ Supported post-olympic strategy review for the United States Olympic Committee after 2018 PyeongChang games

## Larry Francioni IV

Larry is a Manager in our Crisis Recovery practice based out of our New Orleans office. His skills and experience will allow him to assist with subrecipient assessments and monitoring through a financial analysis perspective. He specializes in providing disaster recovery support to states and municipalities for federally funded disaster recovery programs.



### EXPERIENCE IN THE INDUSTRY

Larry is supporting the State of Louisiana with its monitoring and implementation of Public Assistance programs. While focusing on disaster recovery efforts, he has developed a comprehensive understanding of the Stafford Act, 2 CFR, 44 CFR and specific issues facing subrecipients of federal disaster grants across multiple programs including Public Assistance, ARPA, IJJA, and more.

### EDUCATION AND TRAINING

Bachelor of Science, Accounting, Louisiana State University

Project Management Professional

### SELECTED EXPERIENCE

#### GOHSEP Closeout and Grants Management Team, State of Louisiana

- ✓ Larry currently manages the largest team in GOHSEP's Public Assistance Closeout and Grant Management section as well as the team that continues to support applicants throughout the State in a Strike Team capacity. Under Larry's management, his team has been responsible for the administration and closure of over 100 grant files as well as hundreds of reimbursement requests in this calendar year alone. His knowledge of 2 CFR and 44 CFR has led to the reconciliation and reimbursement of tens of millions of dollars for his applicants. These applicants include but are not limited to:
  - Jefferson Parish
  - City of New Orleans
  - City of Kenner
  - City of Bogalusa
  - Plaquemine's Parish
  - Orleans Levee District
  - St Tammany Parish School Board
  - Port of New Orleans
  - St Bernard Port Harbor and Terminal District
  - Lake Borgne Basin Levee District
  - Ochsner Clinic Foundation
  - Louisiana SPCA
  - Plaquemines Parish Sheriff's Office
  - St Bernard Parish Sheriff's Department

#### FEMA PA, GOHSEP, State of Louisiana

- ✓ As a member of GOHSEP's Strike Team, Larry assisted high risk subrecipients in identifying issues preventing closeout for disasters including Hurricane Katrina, Rita, Ike, and Isaac. His duties included performing accounting and auditing tasks necessary to prepare projects for closeout by analyzing PWs and reconciling grant funding for the Governor's Office of Homeland Security and Emergency Preparedness. Larry worked directly with subrecipients to both discover deficiencies within their projects and then initiate a corrective action plan to both GOHSEP and the subrecipient so that projects can be processed. To date, Larry has worked directly with the following subrecipients with the closure of their projects:
  - City of New Orleans
  - Plaquemines Parish
  - Plaquemines Parish School Board
  - LSU Health Care Sciences Division
  - Orleans Parish Sheriff's Office
  - City of Kenner
  - St. Tammany Parish School Board
  - City of Gretna
  - New Orleans Sewage and Water Board
  - Archdiocese of New Orleans

#### Internal Audit, Various Clients

- Worked with multiple Fortune 500 clients across various industries by monitoring and correcting their internal audit processes to reasonably assure federal regulation compliance and proper control analysis. This included federally mandated SOX compliance testing and IT control system analysis for companies in the electrical, oil and gas, and mineral industries. During these internal audit engagements, Larry was responsible for site examination, process innovation and transition, and compliance with policy and procedures. He regularly worked to correct complex issues and improve system effectiveness and efficiency.

## Nicholas Karam

Nick is a Senior Consultant in our Crisis Recovery practice based out of the New Orleans office. His skills and experience allow him to assist with subrecipient assessments and monitoring through a financial accounting lens. He specializes in providing disaster recovery support to states and municipalities for federally funded disaster recovery programs, with a focus on PA, ARPA, and IJJA programs



### EXPERIENCE IN THE INDUSTRY

Nick currently supports GOHSEP's Strike Team contract for the New Orleans area. In this role, Nick supports the State of Louisiana with their monitoring and implementation of Public Assistance programs. While focusing on disaster recovery efforts, he has developed a comprehensive understanding of the Stafford Act and specific issues facing subrecipients of the Public Assistance grant.

### EDUCATION AND TRAINING

Master of Finance, Louisiana State University

Bachelor of Science, Finance, Louisiana State University

Project Management Professional

### SELECTED EXPERIENCE

#### GOHSEP Closeout and Grants Management Team, State of Louisiana

- ✓ Manages a team in GOHSEP's Public Assistance Closeout and Grant Management section as well as the team that continues to support applicants throughout the State in a Strike Team capacity. Under Nick's management, his team has been responsible for the administration and closure of over 100 grant files as well as hundreds of reimbursement requests. His knowledge of 2 CFR and 44 CFR has led to the reconciliation and reimbursement of millions of dollars for his applicants. These applicants include but are not limited to:
  - Jefferson Parish Public School System
  - City of Gretna
  - West Jefferson Medical Center
  - Orleans Parish Sheriff's Office
  - City of Slidell
  - LSU HCSD
  - Tangipahoa Parish School System
  - Archdiocese of New Orleans
  - Housing Authority of New Orleans
  - Orleans Parish School Board
  - Dillard University
  - New Orleans Pubic Belt Railroad
  - South Louisiana Electric Cooperative Association

#### FEMA PA, GOHSEP, State of Louisiana

- ✓ During his time working with the State of Louisiana, Nick has supported multiple projects related to the administration of the Public Assistance grant broad as outlined below:
- ✓ Assists high risk subrecipients in identifying, classifying, and resolving issues to expedite the closeout process and assist GOHSEP in reaching closeout targets.
- ✓ Assists high risk subrecipients in identifying issues preventing closeout for disasters including Hurricane Katrina, Rita, Ike, and Isaac. His duties include performing accounting and auditing tasks necessary to prepare projects for closeout by analyzing PWs and reconciling grant funding for the Governor's Office of Homeland Security and Emergency Preparedness. Nick works directly with subrecipients to both discover deficiencies within their projects and then initiate a corrective action plan to both GOHSEP and the subrecipient so that projects can be properly processed.

#### Internal Audit, Various Clients

- ✓ Assisted Fortune 500 organizations in assessing the design, implementation, and operating effectiveness of their internal controls over financial reporting testing to assess compliance with the Sarbanes-Oxley Act. He conducted walkthroughs, organized meetings, gathered evidence, tested internal controls, and communicated testing findings to the clients.

## Bobbie Harper

Bobbie has 3.5 years of experience in providing grants management services for state and local agencies. She currently leads the ARPA grant management team at Lafayette to deliver procurement compliance, eligibility reviews, fund strategy, reporting support, and audit support services. She has also provided support to local agencies in mitigating risks through compliance assessments, policy management, procurement reviews, financial management, and cash flow projections.



### EXPERIENCE IN THE INDUSTRY

Bobbie has worked closely with various local agencies in Louisiana in helping them manage their grants and maintain compliance at all phases in the project lifecycle. She has spearheaded strategic initiatives to expedite the project closeout process and help state agencies meet their programmatic goals and metrics. She has assisted in documenting and supporting claims, resolving findings, advancing project closeouts, and maintaining documentation to comply with regulations.

### EDUCATION AND TRAINING

Master of Accounting, University of Houston, Houston, Texas

Bachelor of Accounting, University of Houston, Houston, Texas

### CERTIFICATIONS

Certified Public Accountant (CPA)

### SELECTED EXPERIENCE

#### Lafayette Consolidated Government (LCG)

- ✓ Bobbie is managing LCG's ARPA grant funding which includes procurement reviews, eligibility determinations, reporting support, and audit compliance. More specifically, Bobbie was able to successfully identify an additional \$12M in Parish ARPA lost revenue funding to maximize flexible spending for the Parish. Her team is providing procurement consulting services to minimize federal funding clawbacks, develop grant management procedures to streamline LCG's grant administration operations, and is working with various LCG stakeholders to gather Treasury quarterly reporting data required to maintain program compliance and demonstrate progress towards the programmatic goals of ARPA, including equity considerations, socioeconomic factors, impacted communities, and public health and safety.

#### Pennsylvania Department of Education (PDE)

- ✓ Bobbie is leading a team in providing subrecipient monitoring planning services for the ESSER I, ESSER II, and ARP ESSER grants. As part of the monitoring plan, she provided the vision to deliver the necessary tools to monitor 800+ subrecipients across \$7.7B dollars in grant funding. The team developed a risk-based approach by creating a risk assessment based on various financial, compliance, and program-specific risk criteria. Then, her team developed a calendar of monitoring procedures that relied on risk level inputs to adjust monitoring coverage as needed. Next, the team developed a comprehensive monitoring protocol based on the applicable regulatory framework to be used to document testing procedures, workpapers, findings, and associated regulation. Finally, the team developed a communication plan consisting of a detailed flow chart and associated letter templates to streamline and expedite the ongoing communication process for subrecipients.

#### FEMA PA, GOHSEP, State of Louisiana

- ✓ Bobbie spearheaded various special projects designed to grow metrics, including increasing monthly project closeouts by roughly 20%. As a Strike Team Specialist, she assisted subrecipients in consolidating and submitting reimbursement and closeout documentation while also acting as a liaison between the subrecipient and the State, coordinating with all parties to quickly resolve findings and facilitate closeout of projects. Additionally, Bobbie lead two of the State's largest subrecipients, working with a team of eight to resolve complex challenges delaying closeout. She has led a policy reconciliation across various GOHSEP departments to identify critical policy gaps and gray areas that create process delays and obstacles while providing recommendations for resolution.

## City of Houston

- ✓ Bobbie developed a compliance matrix across various sources of regulation before conducting procurement reviews and current state assessments to facilitate compliance with Federal, state, and local regulations. She also created budgeting and forecasting models for projecting the spend of grant funds of up to \$1.3B. She has developed cash flow forecast reports and dashboards to present program financial and operational progress to the public in a digestible manner. She has extensive experience analyzing revenue and expense streams and provided recommendations for cash flow optimization. Additionally, Bobbie has assisted in minimizing risk of de-obligation by analyzing actual progress against key performance metrics to determine if restructuring of program expenditures patterns was necessary.

## Yara Ibrahim

Yara is a Consultant with significant experience in federal grants management and IJJA policy, project management, crisis response, and strategic management consulting.



### EXPERIENCE IN THE INDUSTRY

Yara has significant experience working in the areas of grants management, crisis response, system organization and improvement, and federal funding management. Yara has been involved in helping clients manage multimillion-dollar programs and successfully implemented projects and grants in crisis environments. Yara has demonstrated capabilities to help teams and organizations efficiently set up and effectively administer complex program and provide effective strategic guidance to State and local clients.

### EDUCATION AND TRAINING

Bachelor of Arts, Government, Franklin & Marshall College

### SELECTED EXPERIENCE

#### Lafayette Consolidated Government

- ✓ Drafted a comprehensive grants policy & procedure manual to enhance departmental coordination and streamline grants application process across various departments
- ✓ Facilitated in person working session with the client to better understand existing procedures relevant to grant identification, grant application, grant budgeting, grant monitoring, grant execution, and grant closeout
- ✓ Incorporated state, federal, and local guidelines and regulations relevant to grant application, execution, monitoring, and closeout
- ✓ Drafted contract provisions on behalf of LCG for various local RFP.

#### FEMA PA, GOHSEP, State of Louisiana

- ✓ Performed closeout financial reconciliation for 50+ multi-million-dollar Project Worksheets (PWs) for Disasters 1603, 1607, 4080, 4263, and 4277; and advanced to Federal Emergency Management Agency (FEMA) for review.
- ✓ Compiled and submitted 100+ reimbursement requests on behalf of various applicants across different disasters.
- ✓ Managed Applicant's PWs portfolio, drafted monthly progress reports, and synthesized information to senior leadership.
- ✓ Established and enhanced relationships with local, state, and federal stakeholders to further enhance the Closeout process.
- ✓ Served as a liaison between applicants and FEMA

#### FEMA PA, Sandy Recovery Project Management/Closeout, New York City Mayor's Office of Management and Budget

- ✓ Performed closeout financial reconciliation for multi- million-dollar Project Worksheets (PWs) for Disaster 4085 (Hurricane Sandy)
- ✓ Provided project management support to NYC Sandy Recovery team including tracking expense, revenue and deliverables.
- ✓ Analyzed Federal Emergency Management Agency (FEMA) related documents and uploaded them to a Document Management System (DMS) for retention and audit purposes.
- ✓ Developed and presented quarterly firm-wide business development presentations to 250+ staff members that highlighted firm accomplishments, potential clients/proposals, social impact, and revenue growth/projections.
- ✓ Managed movements of multi-million-dollar Project Worksheets (PWs) through Quickbase Grants Management System (GMS) application platform and ensured submission to NYS Division of Homeland Security & Emergency Services (DHSES).
- ✓ Facilitated bi-weekly meetings to improve client relations by addressing delivery issues and identifying growth opportunities.
- ✓ Researched, analyzed, and synthesized the CARES act to determine eligibility for various clients.

## Brenda Villarreal

Brenda is a process-driven project manager specializing in customer facing initiatives. She is eager to leverage expertise in business transformation to standardize complex procedures and develop business strategies from conceptualization through implementation.



### EXPERIENCE IN THE INDUSTRY

Brenda is a planning and Operations project manager focusing on large transformation projects. She conducts state assessments, evaluates results and identifies realistic and executable strategies for her clients. She is proficient in project management through agile methodology. She has also provided structural engineering design services to various clients and has also been part of a FEMA project facilitating emergency power supply at critical public facilities during disasters

### EDUCATION AND TRAINING

Bachelor of Science in Civil Engineering, Concentration in Structures, Virginia Tech University

Professional Engineer from Virginia Department of Professional and Occupational Regulation

ENV SP from Institute of Sustainable Infrastructure

### SELECTED EXPERIENCE

#### Washington Metropolitan Area Transit Authority (WMATA) Transformation Project

- ✓ Lead initiatives to improve performance across simultaneous work-streams with an Agile approach.
- ✓ Transformed and aligned procedures to ensure safe and efficient operation of trains. Helped define timelines, budgets, KPIs, deliverables, and monitoring program data to assess efficiency.
- ✓ Conducted current state assessments, evaluates results, and identifies realistic and executable strategies.
- ✓ Developed a course of action by breaking down complex concepts into practicable systems.
- ✓ Partnered with key stakeholders to identify and execute cross-functional goals through various communication protocols including verbal and written reporting for project status, escalation, and overall milestone updates.

#### Bay Branch Wildfire Debris Clean-up, Bay Area California

- ✓ Served as the Branch Planner for CalRecycle Bay Branch region south of San Francisco covering Santa Cruz, Santa Clara, San Mateo, Stanislaus, and Monterey Counties.
- ✓ Provided structural debris and hazard tree assessment services for 1,154 private and 10 state park properties. Managed five planning assistants that were tasked with all phases of Bay Branch cross-functional operations.
- ✓ Managed over 150 subcontracting staff from over 20 companies with collective capabilities.
- ✓ Programmed project objectives, metrics, and standard processes that resulted in 150% increase in assessment rate. Implemented and tracked schedule of operations to ensure timely and effective completion of key milestones.

#### US Army Corps of Engineers (USACE), Advanced Contract Initiative (ACI) for Emergency Power

- ✓ Supported USACE, Pittsburgh District, to fulfill its mandate to support Federal Emergency Management Agency (FEMA) in providing emergency power at critical public facilities in response to natural and man-made disasters in the United States and its territories.
- ✓ Managed field operations to ensure contract production rates were established, coordinated with USACE and WSP field operations to support up to 200 personnel performing generator maintenance for over 500 generators.
- ✓ Facilitated multi-location mobilization logistics and subcontractor notifications. Coordinated with developers to create a new software to support mission operations. Created training curriculum for incident commander and resource unit leader positions.

#### United Airlines, New Polaris Lounge, Dulles Washington International Airport

- ✓ Provided structural engineering design services for a new 20,000 sq-ft luxury lounge under United's Polaris brand.
- ✓ Communicated challenges and progress to upper management via engaging presentations. Consistently met deadlines and received commendations during client meetings for seven consecutive months.

## Auguste Boova

Auguste has experience providing program management, construction management, asset management and financing/funding, project scheduling, risk management, and value engineering for public and private sector capital projects.



### EXPERIENCE IN THE INDUSTRY

For the last 3 years Auguste has supported asset management, grants management, and the development and management of program management offices (PMOs) for federal and state clients, aimed at improving coordination, accuracy, and accountability of long-term, organization wide transformation initiatives. He oversaw pre-planning, construction, and closeout of over 1,000,000 SF of concrete construction across the mixed-use and industrial sectors in Washington, DC.

### EDUCATION AND TRAINING

Bachelor of Science in Civil Engineering, George Washington University, Washington, DC

### SELECTED EXPERIENCE

#### Grant Management and Project Execution – Local Government

- ✓ Auguste supports a local government with the planning, procurement, and execution of various infrastructure projects funded valued at \$100 million. Auguste coordinated with the Public Works and Purchasing divisions to identify and qualify eligible projects related to drinking water, drainage, transportation, and facility improvement and construction. To successfully deliver this initiative, Auguste worked in lockstep with Deloitte grants specialists to coordinate between the involved departments to proactively vet grant eligibility and compliance of major capital projects to minimize frivolous planning expenditures and resources. Additionally, Auguste developed project status trackers and dashboards through stakeholder interviews, project scope and design analysis, and assessments of allocated and unallocated funds.

#### Grant Management and Project Execution – State Agency

- ✓ For a statewide health department, Auguste led and supported the planning and deployment of funds valued at \$150 million across four initiatives, including broadband, drinking water, well and septic, and facility upgrades necessary to combat the COVID-19 pandemic. While serving this client, Auguste and the team implemented tools to plan for and prioritize projects, utilizing a tailor-made project prioritization tool to maximize efficiency of funds within the impacted communities. Additionally, Auguste supported coordination and qualification of potential vendors through robust pilot programs designed to identify the most qualified and competent vendors for statewide implementation programs.

#### Broadband Implementation Strategy – State Agency

- ✓ Auguste developed a broadband implementation program plan for a state Department of Information Technology (DoIT) to finalize a statewide broadband plan detailing critical current-state analysis and implementation options and strategies. This report included information such as fiber and cable networks, locations served by various internet service providers, and equity considerations such as Social Vulnerability Index (SVI) and provided the client with a comprehensive view of the state's existing broadband infrastructure as well as an implementation strategy to improve broadband service across the state.

#### Asset Management and Alternative Finance – Federal Agency

- ✓ Auguste supported asset management activities for a federal land management agency, including identifying alternative portfolio financing opportunities, conducting asset data analysis, and engaging with private industry as part of the financing feasibility analysis. Auguste tailored IAM's ISO55000 to the client's current and future state needs to devise asset financing options in line with industry best practices.
- ✓ Auguste identified opportunities to increase revenue generating activities while simultaneously decreasing portfolio-wide operating expenses for a portfolio valued at approximately \$119 billion, consisting of transportation infrastructure, water and wastewater systems, and various facilities,
- ✓ To establish actionable alternative financing recommendations, Auguste identified procedural and governance shortfalls within the client's asset management program, developed creative and untested financing structures, and identified opportunities to scale up pilot, regional programs to the national level to increase the impact of previously successful small-scale initiatives.
- ✓ Auguste developed business cases for deploying asset alternative financing initiatives, including magnitude of impact to current portfolio operations and sequence of implementation, such as structuring relevant stakeholders and responsibilities.

### Software Development and Deployment Scheduling – Federal Agency

- ✓ Auguste created, optimized, and maintained a comprehensive integrated master schedule (IMS) used to coordinate the development and deployment of a new, enterprise-wide COTS software. Through his analysis of disparate scheduling documents and leading working sessions with stakeholders, Auguste developed accurate and automated schedules that integrated 11 program workstreams.
- ✓ Auguste led and mentored 3 analysts to educate and empower them with the knowledge necessary to best support
- ✓ Auguste educated schedule POCs of scheduling best practices and coordinated and managed 11 separate schedules, consisting of over 4,000 activities, which resulted in a comprehensive master schedule used by 100+ schedule stakeholders and IRS leadership
- ✓ Master schedule created by Auguste resulted in increased accuracy of activity forecasting and slippage
- ✓ Auguste regularly led internal team standups to discuss priority items, identify threats to completion, and delegate work. This due diligence resulted in the timely delivery of the final solution to the customer organization.
- ✓ Auguste's scheduling service resulted in additional IMS SMS work being sold in another area of IRS

### Integrated Master Scheduling – Federal Agency

- ✓ Auguste supported the Integrated Master Schedule (IMS) task order as a part of the PMSS2 engagement. Auguste assisted with the management of schedules, industry stakeholders, and Deloitte resources pertinent to the successful delivery of updated biometrics and vetting procedures. While working on this task order, Auguste delivered bi-weekly project status dashboards to the client, alerting TSA leadership of upcoming milestones as well as remaining available financial and human resources

## Damon T. Armeni

Damon is a demonstrated leader with a successful history of personnel management, budgets, and project execution in a wide variety of environments and roles including with U.S. Customs and Border Protection and the Army Staff. He is a retired Army officer and combat veteran and is intimately familiar with the VA disability process as a result of extensive combat wounds.



### EXPERIENCE IN THE INDUSTRY

Damon is a Senior Manager in Deloitte Risk & Financial Advisory with several years of experience in emergency and crisis management at numerous Departments and Agencies. As the former Director for Response Policy on the National Security Council, Damon is a specialist in the nation's response policies and as FEMA's Deputy Director for Congressional Affairs, is a specialist and manages Congressional expectations during a crisis and negotiating the development of appropriations bills and legislative solutions.

### EDUCATION AND TRAINING

Pacific Lutheran University, B.A., Political Science

University of Virginia, M.A., Foreign Affairs

United States Army Command and General Staff College

Defense Strategy Course

### SELECTED EXPERIENCE

#### Policies, Procedures, and Strategy, DOB, New York State

- ✓ Led a team responsible for informing New York State leadership on rules, regulations, and implementation of over 43 discrete funding streams unique to the federal Covid-19 response, developing and maintaining a single point reference document for all relevant funding streams, coordinating the development of a comprehensive strategy for the most efficient use of federal grant dollars, and assisting New York State with federal engagement and communications strategies.

#### COVID-19 Emergency Response, DHSES, New York State

- ✓ Led a team responsible for developing Emergency Response policies, procedures, and strategies to inform New York State's response to the Covid-19 Pandemic including the development of a vaccines distribution plan, updating the state Pandemic Annex, formulation of the first emergency declaration for a Pandemic in US History, development and implementation of a Table Top Exercise, development and implementation of resource distribution plans, communications plans, social media monitoring for trends and concerns, and the development of a comprehensive engagement and communications strategy for dealing with more than 40 unique federal grants relating to COVID-19.

#### External Stakeholder Engagement and Strategy / COR3, Puerto Rico

- ✓ Developed and recommended messaging and communications strategy relating to engagement with federal agencies, congressional stakeholders, and the public.
- ✓ Advised COR3 and Puerto Rico leadership on Disaster Response policies and procedures, regulatory and statutory guidelines related to disaster response and recovery and facilitated cogent communications with relevant stakeholders as needed to advance COR3 and Puerto Rican objectives.

#### Director, Response Policy / National Security Council Staff, White House, D.C.

- ✓ Developed and recommended policy relating to domestic response to the full spectrum of potential threats to the homeland. Planned and executed policy coordination committees, including Deputies and Principals meetings to determine national policy to include providing recommendations for decision. Position held concurrent with Deputy Director Legislative Affairs for FEMA.

### **Deputy Director, FEMA Congressional Affairs, Washington D.C.**

- ✓ Developed, recommended, and implemented communication strategies which were vital to the overall formulation, awareness and acceptance of the Agency's programs and policies by Congressional stakeholders.
- ✓ Developed and implemented policy and overall planning for the programs and processes relating to congressional affairs activities for the Agency.

### **Branch Chief, U.S. Customs and Border Protection, Washington D.C.**

- ✓ Developed, recommended, and implemented communication strategies which were vital to the overall formulation, awareness and acceptance of the Agency's programs and policies by Congressional stakeholders for U.S. Border Patrol, Air and Marine Operations, Human Resource Management, and Office of Professional Responsibility.
- ✓ Developed and implemented policy and overall planning for the programs and processes relating to congressional affairs activities for the Agency.

### **Strategic Advisor, United States Army, Pentagon**

- ✓ Responsible for developing and promulgating policy, force management decisions, and congressional engagement strategy for the Deputy Chief of Staff of the Army for Operations and Plans (G-3/5/7).
- ✓ Position held as a civilian November 2014 – March 2015 and as an Officer April 2012 to November 2014 when retired for combat wounds.

## William Booher

Mr. Booher has almost 10 years of experience in the emergency management field at the federal, state, and private sector levels. As the former Director of Public Affairs for the Federal Emergency Management Agency he has experience in crisis communications, programmatic functions and successful response and recovery efforts. Mr. Booher's increasing responsibilities have included successful management of personnel, budgets, and project execution.



### EXPERIENCE IN THE INDUSTRY

William possesses experience at the federal and state level working directly with creation, dissemination, execution, and communications of FEMA programs, policies, and procedures. William currently supports Puerto Rico's Central Office of Recovery, Rebuilding, and Resiliency (COR3) contract as a workstream lead for the project's Strategy and stakeholder Engagement team. In this capacity, his responsibilities include advising COR3 on strategic decisions related to the recovery – including stakeholder engagement internal and external to the Government of Puerto Rico (GPR). These stakeholders include the White House, Office of Management and Budget (OMB), Congress, Housing and Urban Development (HUD), and FEMA. Resolution of key issues related to Legislation or Executive Branch policy which include Public Assistance, Section 428, programmatic and policy questions.

### EDUCATION AND TRAINING

Bachelor of Science in Finance and Marketing, Tulane University

### SELECTED EXPERIENCE

#### Senior Manager, Deloitte

- ✓ Advise leaders before, during and after a crisis event, and work side-by-side with them to manage and improve operations, outcomes, issue mitigation, and to communicate effectively across complex stakeholder environments.
- ✓ Build and manage teams to advise agency executives through the full lifecycle of emergency management operations, to design and deliver tailored, longer-term solutions for federal, state, and local clients
- ✓ Support crisis response through the development of risk informed communications, insight-driven stakeholder outreach, and on-the-ground executive level support, resulting in clarity of messaging and controlled operations.
- ✓ Serve subject matter advisor to firm leadership on matters related to communications strategy, government relations and FEMA agency activities

#### Director, Public Affairs, Federal Emergency Management Agency (FEMA)

- ✓ Developed, recommended, and implemented communication strategies which were vital to the overall formulation, awareness and acceptance of the Agency's programs and policies. Developed and implemented policy and overall planning for the communications programs and processes relating to public affairs activities for the Agency.

#### Executive Director (Interim), Pelican Institute For Public Policy

- ✓ Responsible for all aspects of the Institute and its policy development mission; fiscal and budgetary oversight, grant identification and application, policy development, coalition building, public outreach, and education.

#### Public Affairs Director And Emergency Management Liaison (Consultant), Bayou Corne Response Operations

- ✓ Served as professional services consultant through Frontier International Group, LLC to Texas Brine Company (TBC) in their response to the Bayou Corne Sinkhole Incident, with responsibilities to manage the implementation of TBC community relations and local official engagement strategy.

#### Director, External Affairs, Florida Division of Emergency Management

- ✓ Responsible for developing and promulgating emergency management policies and administrative rules; coordinating intergovernmental programs and policies; supervising the coordination and development of programs, materials, publications and policies of the Division for dissemination to the citizens of the State, the Legislature, the media and other interested groups.

### **Compliance Specialist, The Shaw Group**

- ✓ Contract support to the State of Louisiana Division of Administration Office of Community Development, to manage and implement disaster recovery programs because of Hurricanes Katrina/Rita and Gustav/Ike, specifically HMGP and CDBG.
- ✓ Primary responsibilities included writing, editing, and developing policy and position papers for the state based upon federal guidelines for program implementation.

### **Counselor to The Assistant Administrator for Gulf Coast Recovery, FEMA**

- ✓ Performed a broad variety of assignments in order to facilitate the efficient and effective execution of the Assistant Administrator's responsibilities and the GCRO mission. Independently researched, developed, and crafted position papers and talking points for policy and programmatic issues identified through interaction with internal and external stakeholders. Served as a liaison for the Assistant Administrator with internal senior staff and external stakeholders, including members of the federal, state, local governments, and private sector constituents.

### **Special Assistant to the Administrator, R. David Paulison, FEMA**

- ✓ Served as Special Assistant and Traveling Aide to FEMA Administrator R. David Paulison with responsibilities that included planning, coordinating, executing, and follow up for all meetings, events, and travel in which the Administrator participated. Full spectrum access, view and interaction with the agency's programs, policies, mission, and stakeholders.

## Kevin Lane

With over 20 years of professional experience in advisory services, Kevin has served in a variety of leadership and technical roles over the course of his career. Kevin now serves government and public services clients throughout the U.S. in meeting their program integrity, risk, and compliance objectives, focusing on service offerings associated with reducing fraud, waste, and abuse.



### EXPERIENCE IN THE INDUSTRY

Kevin is a Principal in Deloitte’s Risk and Financial Advisory Practice under Regulatory & Legal Support. He has over 20+ years of experience serving a variety of government and public services clients. Additionally, he works with clients to meet program integrity, risk, and compliance objectives, focusing on service offerings associated with reducing fraud, waste, and abuse.

### EDUCATION AND TRAINING

Master of Science, Accounting (Information Systems), Virginia Tech University

Bachelor of Science in Accounting (Information Systems), Virginia Tech University

### SELECTED EXPERIENCE

#### State of Wyoming

- ✓ Currently assisting the State of Wyoming with the implementation of a Salesforce solution to support renters unable to pay their rent and utilities due to COVID-19.
- ✓ As an Executive Subject Matter Advisor, Kevin worked closely with the State and delivery teams on matters relating to fraud. Overall, the project team worked to support program design, development of program processes, procedures, applications, guidelines, and FAQs as well as our Deloitte GovConnect technology platform utilized by case managers for application intake, reviews, tracking and payment support.

#### District of Columbia

- ✓ Supported the integration of a hybrid-operate solution through the administration of \$200 million in CARES Act ERAP funding to support renters unable to pay their rent and utilities due to COVID-19.
- ✓ As the Fraud Analytics Lead, Kevin leads a team of fraud analytics professional in the prevention, detection, and response to potential fraudulent applications. He supports the design and implementation of new analytics models for identifying fraud and provides management reporting and insights to the program leadership team on matters relating to fraud.

#### State of Nebraska

- ✓ Kevin is currently supporting the State of Nebraska’s Military Department, Emergency Management Agency, Health and Human Services Agency, Economic Development Agency, Budget Office, State Accounting Office, and the Governor’s Office with program administration activities over \$1.083 B in CARES Act Coronavirus Relief Funds. Over a dozen programs have been stood up to deliver over \$950M of COVID-19 support to business, local governments, and the citizens of Nebraska.

## Igor Dabik

Igor provides transaction, procurement, commercial strategy and structuring services to ports, rail, transportation, water/wastewater, social infrastructure and other infrastructure projects and assets. He leads financial modelling, option analyses, evaluates and advises on financial strategies, structures debt, develops risk mitigation strategies, identifies funding and financing sources, and advises on deal negotiations. Prior to joining Deloitte, Igor spent time working as a US port and renewable energy developer and M&A officer.



### EXPERIENCE IN THE INDUSTRY

Igor has 10 years of experience in Water & Social Infrastructure. Primarily, he serves as a transaction advisor to clients engaging in bidding, funding, financing, and commercial structuring of public-private partnership (P3) investments across all infrastructure sub-classes, including public infrastructure, conventional and renewable energy, social infrastructure, transportation and transit, ports, water and wastewater, and digital infrastructure.

### EDUCATION AND TRAINING

Master's, Georgetown University, Washington DC

Bachelor's, St. Lawrence University, New York

### SELECTED EXPERIENCE

#### Financial Advisor - WIFIA, Environmental Protection Agency

- ✓ Serving as Lender's financial advisory to the WIFIA Federal credit program for water and wastewater projects in the US. Provide affordability and financial / creditworthiness analyses for loan applications. Provided services to WIFIA on more than 11 loans for a total aggregated capital cost of more than \$4 billion.

#### Financial Advisor - Large State University Energy P3

- ✓ P3 Advisor to a Large State University Utilities and Energy Management (UEM) group. In support of University's internal decision making about whether to pursue a P3 transaction, we conducted a P3 Value for Money (VFM) analysis and preliminary market appetite sounding of potential bidders for a concession with a large upfront payment.

#### Financial Advisor - "Project X" Toll Road Valuation and P3 Strategy

- ✓ P3 and Financial Advisor to Virginia Department of Transportation (VDOT) Office of P3 on evaluating the future commercial options for one of the tolled state routes near Richmond. Conducted full valuation of existing asset, evaluated commercial and financial opportunities and implication of constructing an extension, and delivering as a public-private partnership (P3).

#### Financial Advisor - Elizabeth River Crossing P3 Shadow Bid Valuation

- ✓ Financial Advisor to Virginia Department of Transportation (VDOT) Office of P3 on the shadow bid calibration and valuation (DCF and EBITDA multiple) of an operating P3 concession ahead of a successful bid to re-sell the equity to a new group of investors.

#### Financial Advisor - Developer Advisory for Louisiana State University Thermal Energy P3/CEA

- ✓ P3 Advisor to a large utility developer part of a bidding group for the operation of Louisiana State University's thermal assets under a Cooperative Endeavour Agreement (CEA). Note: A CEA is the acronym Louisiana uses for P3s.

#### Financial Advisor - McKinney E-Sports Arena P3

- ✓ Financial Advisor to the City of McKinney, Texas in the feasibility analysis, planning, negotiating, and structuring a social infrastructure partnership with a private developer for the construction and maintenance of an E-Sports Arena and a Mixed-Use Real Estate Development.

#### Financial Advisor - New Orleans Regional Transport. Authority (NORTA) Performance-based O&M Contract

- ✓ Advised NORTA on designing a performance-based contract for the operation and maintenance contract of its transit services in the city of New Orleans across four modes of transit: bus, streetcar, ferry, and paratransit. The project included guiding NORTA

through a procurement, designing the payment formula and Key Performance Indicator regime, and navigating perceived incumbency advantage.

### **Project Advisor, Treasurer of Ohio**

- ✓ Advised Treasurer of Ohio in support of the development of the ResultsOHIO program, a performance-based approach to providing health and human services to residents. Provided strategic, risk, and commercial advice and analyses for the creation of the program.

## Christa López

Christa López is a Specialist Leader within Government and Public Services. Formerly, she was the Deputy Director for Operations and Chief of Staff for Community Development and Revitalization with the Texas General Land Office, under Commissioner George P. Bush. Prior to joining the GLO, Christa was the Section Administrator for Human Services at the Texas Division of Emergency Management.



### EXPERIENCE IN THE INDUSTRY

Christa brings 7 years of experience from state government leadership in Individual Assistance Programs and Community Development Block Grant Disaster Recovery and Mitigation – to include disaster housing and infrastructure projects on multiple disaster declarations. Plus, an additional 8 years managing crises at a large state institution of Higher Education.

### EDUCATION AND TRAINING

Walden University, PhD in Public Policy

American Public University System, M.A. in Emergency and Disaster Management

Shippensburg University, M.S. in Counseling

Delaware Valley University, B.S. in Horticulture

Training Course G-205, Disaster Recovery Planning for the Local Government 2016-2021

Training Course G-288 and G-489 Managing Volunteers and Donated Resources 2016-2021

### SELECTED EXPERIENCE

#### Texas General Land Office (GLO) Deputy Director, Community Development and Revitalization

- ✓ Chief of Staff for a growing staff of 180+ team members and over 300 contract personnel.
- ✓ Supervised the administration and implementation of the first state-led FEMA funded Direct Housing Mission, ensuring the program integrity serving over 3400 households.
- ✓ Created standard operating guidelines with consideration of the needs of urban and rural communities related to equitable and sustainable living conditions.
- ✓ Disaster recovery housing and infrastructure operations oversight resulting from over \$12 billion in federal funding while encouraging resilient construction to meet the challenges of extreme weather.
- ✓ Presented in legislative and regulatory proceedings and guide rule implementation teams.

#### Texas Division of Emergency Management, Section Administrator, Human Services in Recovery Mitigation Services

- ✓ Performed the duties of Individual Assistance Branch Director during federal declared disasters.
- ✓ Performed the duties of the Manager for the Human Services Unit, covering the State of Texas.
- ✓ Supervised professional staff in the Individual Assistance Recovery team.
- ✓ Managed federal grant programs and arrange for single audits.
- ✓ Provided technical assistance and guidance to local, state and nongovernmental organizational collaborators.
- ✓ Served as the subject matter advisor for the state regarding the Individual and Households Program.

## Christine Daoud

Christine Daoud is a Senior Manager in Deloitte's Infrastructure and Capital Projects Practice. Christine brings over 13 years of public and private sector consulting experience, leading cross-functional teams in the areas of project management, real property program management and asset management, and the applicable policy, governance, information technology, and change management to support those approaches. Christine brings a diverse set of project management experience including leading the PMO for a Federal Agency's ARRA response; leading program governance for a passenger rail's asset management technology program; and leading program management and strategic planning for a federal client's real property program office. Christine is currently supporting a state government with its ARPA construction oversight management needs. Christine is a certified PMP and CGFM.



### EXPERIENCE IN THE INDUSTRY

Christine brings over 12 years of public and private sector consulting experience, leading cross-functional teams in the areas of real property program management and asset management, and the applicable policy, governance, information technology, and change management to support those solutions.

### EDUCATION AND TRAINING

B.S., Finance, Virginia Polytechnic Institute and State University (Virginia Tech), Virginia

### CERTIFICATIONS

Project Management Institute, Project Management Professional (PMP)  
Association of Government Accountants (AGA), Certified Government Financial Manager (CGFM)  
Archibus EU101: Fundamentals

### SELECTED EXPERIENCE

#### Deloitte

- ✓ Leading the construction oversight management workstream of the LCG ARPA program, where the team is responsible for construction PMO, procurement, and management support including schedule and cost monitoring, issue and risk tracking, site inspections, and change order oversight
- ✓ Leading the analysis of public-private partnership considerations for a state DOT to support implementation of its National Electric Vehicle Infrastructure (NEVI) plan.
- ✓ Leading internal infrastructure strategic planning efforts for delivering support to state and local public sector entities in the Southern and Midwest markets.

#### Guidehouse, LLP

- ✓ Joined a \$14M engagement for a national security client two months prior to Go-Live of a pilot hoteling program where limited to no stakeholder engagement occurred and no users were identified; established a Go-Live strategy, engaged leadership across 6 Bureaus and 8 Organizations, coached the existing program manager on required next steps, recruited staff to support the effort, oversaw training and communication efforts, stood up a help desk, and drove a successful go live for 200+ users by the end of the two-month period
- ✓ Oversaw the integrated program governance team for a national rail client's largest IT transformation effort, establishing governance over the Maximo Enterprise Asset Management (EAM) deployment of four other vendor teams in the areas of project management, organizational change management (OCM), quality assurance/quality control, and release deployment management; promoting collaboration and sound requirements traceability
- ✓ Oversaw a team supporting a public sector Transportation client with integrating real estate into their acquisition policy and guidance by facilitating workshops to engage acquisition, real estate, and legal subject matter experts (SMEs) to gather their input on necessary changes; facilitated changes to policy and guidance; communicated related roles and responsibilities changes for the workforce; and developed supported training materials
- ✓ Led a team in defining a Transportation client's real and personal property data needs through SME engagement, government-wide policy and requirements, and industry leading practices; documenting findings in a Data Validation Workbook and the agency's first Property Data Dictionary; and preparing a plan for automated data cleansing

## PricewaterhouseCoopers, LLP

- ✓ Served as the Project Manager on an engagement to develop enhancements to a public sector client's RSA Archer deployment to track its OMB Circular A-123 Compliance and Reporting needs across ten applications, impacting a user community of over 100 people
- ✓ Led a multi-phase Archibus Integrated Workplace Management System (IWMS) deployment at a pharmaceutical client to support its Space Management, Move Management, and Hoteling needs as the business consolidated offices to optimize space and decrease costs
- ✓ Led a five-year real property strategic planning effort for a public sector Transportation client with a \$9B portfolio and over 50K assets to meet the requirements of Freeze the Footprint and Reduce the Footprint executive orders, and assess the organization's ability to secure rental rates at or below market average, resulting in anticipated savings of over \$8M
- ✓ Led business case analysis for a public sector Transportation client's real property program office, engaging with real estate contracting officers across the agency's nine regions to identify candidates for consolidation, collocation, and disposal: resulting in over \$2M in annual savings
- ✓ Provided program management support to a public sector acquisition academy's supply chain school as it stood up the first year of its program; established course catalog and curriculum calendar; developed student tracker to track credit hours; and supported responses to the Office of Inspector General (OIG) which allowed the school to successfully pass its OIG audit
- ✓ Provided project management oversight of a cross-functional team at a national rail client to perform lease accounting support services in response to external auditor concerns, advise on the treatment of deferred taxes, and advise on the impairment of assets by Superstorm Sandy for its insurance claim submission
- ✓ Led an internal contract closeout initiative by working with 20+ partners across the firm, the Office of General Counsel (OGC), the Chief Operating Officer (COO), contracts, and finance to assess the list of expired contracts and contracts coming up for expiration, training a team member from each account on assessing and reconciling the contractual requirements against the financials/invoices and routing for closeout approval, and tracking closeout completions; developed a new process for closeouts with the COO, Contracts Director, OGC, and CFO
- ✓ Assessed the ability of the Archibus IWMS solution to meet the Federal Real Property Council (FRPC) reporting requirements, and lease management and administration needs of a public sector Transportation client
- ✓ Managed the American Recovery and Reinvestment Act (ARRA) Recipient Reporting Project Management Office (PMO) of a public sector client that awarded 6,000 contracts and grants to recipients as part of its Recovery Act outreach program; liaised with Tiger Teams across the Department's six Bureaus to collect information on the status of contracts and grants, and reporting data; performed recipient outreach to promote compliance with Federal reporting requirements; assessed reporting results against expected input; and reported results to the Office of Management and Budget (OMB). Obtained a 99% compliance rate across the 6,000 recipients
- ✓ Supported the financial improvement audit readiness efforts of a Defense client, including the development of a tool to track its Notice of Findings and Recommendations (NFRs) and resulting Corrective Action Plans (CAPs)
- ✓ Developed a five-year Strategic Facilities Master Plan (SFMP) for a public sector client, including identifying key performance indicators (KPIs) and benchmarking the agency's data against like agencies, assessing mission criticality of assets, assessing as-is and to-be process for deferred maintenance (DM) and operating and maintenance (O&M) cost prioritization; and creating a repeatable workbook to assess the state of the portfolio
- ✓ Managed the public-facing website for a client external affair's office to highlight its use of Recovery Act funds; led branding and communication efforts for a client's new office
- ✓ Performed a risk assessment on a public sector client's acquisition management and financial assistance management programs; identified key risks that led to a re-organization, and performed an organizational analysis to support the re-organization

## Languages

Classic Arabic – fluent in spoken only, informal

Spanish – moderately proficient

## Shahbaz Ali Niazi

Shahbaz has over 11 years of experience in management, compliance, and reporting of Federal Grant Programs including ARPA, IJJA, CDBG-DR, and FEMA Public Assistance. He has assisted State and Local entities across the country reconcile and retain over \$14 billion in eligible grant funding. He has worked on behalf of subrecipients in helping them document grant claims, address audit findings, and prepare closeout files in compliance with federal regulations. He has also provided consultative support to State and Local agencies in streamlining their policies/procedures and managing risks through data analytics and financial projections.



### EXPERIENCE IN THE INDUSTRY

Shahbaz has over a decade of grant management experience assisting state and local agencies strategize, administer, and maintain compliance over Federal, State and local regulations including but not limited to ARPA, IJJA, CDBG-DR, and Stafford Act grant programs. As a Certified Public Accountant (CPA,) he has also provided OIG audit support to local agencies, as well as closeout assistance to subrecipients helping them identify, reconcile, and document billions of dollars in eligible grant funding. Additionally, he has supported the development of subrecipient monitoring programs, subrecipient assistance programs, as well as a sanctions and appeals programs to recoup funding for large State agencies.

### EDUCATION AND TRAINING

Bachelor of Business Administration Accounting and Supply Chain Management, University of Houston

### CERTIFICATIONS

Certified Public Accountant (CPA)

### Selected Experience

#### Lafayette Parish Consolidated Government

- ✓ Providing regulatory guidance to the team supporting administration and strategy for the management of ARPA funding that includes lost revenue calculations, procurement reviews, eligibility determinations, and project prioritization.
- ✓ Providing subject matter guidance to his team that identified an additional \$12M for Lafayette Parish Consolidated government in ARPA lost revenue funding

#### Pennsylvania Department of Education (PDE)

- ✓ Provided project set-up, process, and regulatory support to stand-up a monitoring program for PDE's ESSER I, ESSER II, and ARP ESSER grants spanning across \$7.7B and 800+ subrecipients

#### COR3, Commonwealth of Puerto Rico

- ✓ Provides grant reimbursement, tracking, reporting and closeout process enhancement support to the team administrating over \$21B in FEMA PA funds

#### FEMA PA, GOHSEP, State of Louisiana

- ✓ Over the course of several contracts with the State of Louisiana, Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP), Shahbaz assisted with the establishment of FEMA PA program management infrastructure for the State ranging from developing policies and procedures to creating financial reconciliation tools and templates as part of the State's technology enhancements. Additionally, Shahbaz was assigned to lead multiple teams that were deployed across the State to assist GOHSEP's grant subrecipients organize and submit project closeout documentations and coordinate between various GOHSEP departments to identify and resolve bottleneck issues hindering closeout progress.

In his current role as a project lead responsible for closing out over \$18 billion in FEMA PA grants, he is:

- ✓ Leading a team of 80+ professionals in providing closeout and reimbursement quality assurance for FEMA recovery programs
- ✓ Supporting GOHSEP leadership on strategy, process improvement, and research initiatives
- ✓ Developed a project tracking dashboard to monitor progress and identify/resolve bottlenecks for over 2500 grant projects across 5 major disasters and funding streams
- ✓ Embedding teams with large applicants in need of additional support to reconcile their final FEMA claims, compile supporting documentation, request versions and time extensions, and to submit project closeout.

- ✓ Developed a 5-year grant closeout strategy for the State of Louisiana & created support infrastructure that allowed the State to exceed its plan over 3 years and counting

### **HUD CDBG-DR, City of Houston**

Lead a team to forecast the City's Housing and Community Development Department (HCDD) and Finance Department (FIN), with managing grant compliance, tracking spending and performing QA/QC activities for its CDBG-DR and FEMA-PA funding sources. This included:

- ✓ Lead the development of a financial forecast model for over \$1.2 Billion in CDBG-DR funding across 10 programs
- ✓ Recovery program current state assessments
- ✓ Performing post award procurement cost reasonableness analysis.
- ✓ Preparing Audit ready procurement document packages.
- ✓ Preparing reports for program management and City Council.

### **FEMA PA, Department of Homeland Security & Emergency Management (DHSEM), State of Colorado**

- ✓ Managed a team of over 40 disaster recovery specialists in conducting more than \$300 million in eligibility reviews across 300 disaster recovery subrecipients, facilitating training sessions to educate state personnel about the grant review process and ways to boost compliance with the federal statutes.
- ✓ Created policies, standard operating procedures, and tools to standardize and streamline the state's review of grant reimbursement requests in compliance with the applicable federal, State and Local Regulations.
- ✓ Streamlined the State's review of FAL/FAE expenses for compliance with federal, state, and local regulations through the creation of an automated template.
- ✓ Conducted financial analysis of the State of Colorado's Disaster Emergency Fund (DEF), created forecasts for future disaster-related expenses and revenues related to Public Assistance, CDBG-DR, and HMGP grants impacting the DEF and provided recommendations to reduce or delay expenses by managing timelines of the Public Assistance cost share payments and/or revenue collection.

### **FEMA PA, Lamar University, State of Texas**

- ✓ Assisted Lamar University in evaluating and supporting expenditures on FEMA Project worksheets related to Hurricane Ike.
- ✓ Supported over \$29.5M in OIG questioned costs for the Texas State University System
- ✓ Supported the university appeal and reclaimed millions in FEMA funds de-obligated due to the lack of supporting documentation.
- ✓ Provided guidance to the university on issues related to procurement and cost reasonableness of construction costs as well as the duplication of benefits resulting from insurance proceeds.
- ✓ Liaised with the Texas Department of Emergency Management's contractors on behalf of the university to respond to audit inquiries and document requests to streamline the closeout of FEMA project worksheets.

### **Governor's Office of Homeland Security & Emergency Management, State of Louisiana**

- ✓ Identified, computed, and projected over
- ✓ Analyzed discrepancies between FEMA's grants disbursement system and the State's financial reporting system to facilitate the development and execution of a reconciliation methodology.
- ✓ Developed a roadmap and computational logic to analyze and clear the backlog of aging transactions outstanding in the State's grants disbursement system totaling over \$1 billion in grants across 30,000 projects.
- ✓ Conducted data migration testing after the State upgraded to a newer version of its grants disbursement system (LAPA). Additionally, Shahbaz has assisted several Public Assistance subrecipients boost compliance levels with grant requirements by helping them reconcile their grant files, organize relevant documentation needed to seek reimbursement and retain documentation needed for grant closeout and potential audits. He has embedded with parishes and local agencies across Louisiana to provide technical assistance and guidance related to a wide range of Public assistance issues ranging from contracting and procurement to document review and retention.

# Appendix B – Insurance Requirements

Deloitte & Touche LLP maintains the insurances required by federal, state, or local statutes, including worker’s compensation and employer’s liability coverage. We also maintain commercial general liability and automobile liability in amounts sufficient to protect the US firms, as well as the interests of our clients, where appropriate. The attached sample certificate of insurance provides evidence of the minimum limits the US firms maintain for each of these coverages.

If Deloitte & Touche LLP is awarded the work, the insurance requirements will be negotiated in good faith as part of the overall contract negotiation process.

		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) 05/26/2022			
<p>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.</p> <p><b>IMPORTANT:</b> 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).</p>							
<b>PRODUCER</b> Marsh USA, Inc. 1166 Avenue of the Americas New York, NY 10036 Attn: realestate.certrequest@marsh.com			<b>CONTACT</b> NAME: PHONE (A/C, No. Ext): FAX (A/C, No): E-MAIL: ADDRESS:				
CN102671568-STND-GAWU-22-23 DT wogiau			INSURER(S) AFFORDING COVERAGE		NAIC #		
<b>INSURED</b>			INSURER A : Continental Casualty Company		20443		
Deloitte LLP			INSURER B : N/A		N/A		
Deloitte & Touche LLP			INSURER C : American Casualty Company of Reading, PA		20427		
			INSURER D : Valley Forge Insurance Company		20508		
			INSURER E :				
			INSURER F :				
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b>		<b>REVISION NUMBER:</b>			
		NYC-009468275-37		32			
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.							
INBR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			GL 6024588866	06/01/2022	06/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" 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  <input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED \$ RETENTION \$			BUA 6024588871	06/01/2022	06/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$
C	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> Y <input type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below			WC 6024588837 (AOS)	06/01/2022	06/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	<input checked="" type="checkbox"/> Stop Gap (OH, ND, WA)			GAP 6042880616 (OH, ND, WA)	06/01/2022	06/01/2023	1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)							
<b>CERTIFICATE HOLDER</b>				<b>CANCELLATION</b>			
Deloitte & Touche LLP				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  			
ACORD 25 (2016/03)		© 1988-2016 ACORD CORPORATION. All rights reserved. The ACORD name and logo are registered marks of ACORD					

Deloitte & Touche LLP maintains professional liability coverage believed to be similar to the programs of other large professional services organizations in the United States. We believe our insurance coverage sufficiently covers the services detailed in this request for proposal. The attached sample certificates of insurance provide evidence of the minimum limits the US firms maintain for this coverage.

		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) 05/26/2022																				
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.																								
<b>IMPORTANT:</b> 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> MARSH USA, INC. 1166 AVENUE OF THE AMERICAS NEW YORK, NY 10036 Attn: RealEstate.CertRequest@marsh.com	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td colspan="2">CONTACT NAME: --</td> </tr> <tr> <td>PHONE (A/C, No, Ext):</td> <td>FAX (A/C, No):</td> </tr> <tr> <td colspan="2">E-MAIL ADDRESS:</td> </tr> <tr> <td colspan="2" style="text-align: center;"><b>INSURER(S) AFFORDING COVERAGE</b></td> </tr> <tr> <td style="width:80%;">INSURER A : North American Capacity Ins Co</td> <td>NAIC # 25038</td> </tr> <tr> <td>INSURER B :</td> <td></td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>				CONTACT NAME: --		PHONE (A/C, No, Ext):	FAX (A/C, No):	E-MAIL ADDRESS:		<b>INSURER(S) AFFORDING COVERAGE</b>		INSURER A : North American Capacity Ins Co	NAIC # 25038	INSURER B :		INSURER C :		INSURER D :		INSURER E :		INSURER F :	
CONTACT NAME: --																								
PHONE (A/C, No, Ext):	FAX (A/C, No):																							
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<b>INSURER(S) AFFORDING COVERAGE</b>																								
INSURER A : North American Capacity Ins Co	NAIC # 25038																							
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INSURER C :																								
INSURER D :																								
INSURER E :																								
INSURER F :																								
CN102871568-STND-PROF-22-23																								
<b>INSURED</b> Deloitte LLP & Deloitte & Touche LLP and all other firms, entities and persons owned, controlled by or associated with the foregoing as more fully described in the Policy. 30 Rockefeller Plaza New York, NY 10112																								
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b>		<b>REVISION NUMBER:</b>																				
		NYC-010786039-55		12																				
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.																								
<b>INSR LTR</b>	<b>TYPE OF INSURANCE</b>	<b>ADDL INSD</b>	<b>SUBR WVD</b>	<b>POLICY NUMBER</b>	<b>POLICY EFF (MM/DD/YYYY)</b>	<b>POLICY EXP (MM/DD/YYYY)</b>	<b>LIMITS</b>																	
	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJ-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 - COMPIOP AGG \$ \$																	
	<input type="checkbox"/> AUTOMOBILE LIABILITY <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) \$ \$																	
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED \$ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$																	
	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTHER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$																	
A	Professional Liability			FIP0008215-15	06/01/2022	06/01/2023	Per 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) 1. This policy is non-cancellable during the period shown. 2. The issuance of this certificate of insurance does not make the person or organization to whom it is issued an additional insured, nor does it modify in any manner the contract of insurance between the insured and the insurer.  Cyber, network, privacy, confidentiality and technology errors and omissions are included in the Professional Liability coverage form.																								
<b>CERTIFICATE HOLDER</b>				<b>CANCELLATION</b>																				
Deloitte & Touche LLP 30 Rockefeller Plaza New York, NY 10112				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  <div style="text-align: right;"><i>Marsh USA Inc.</i></div>																				
© 1988-2016 ACORD CORPORATION. All rights reserved. ACORD 25 (2016/03)      The ACORD name and logo are registered marks of ACORD																								

# Appendix C – Signature Forms

All of the forms and attachments found in this response have been prepared to the best knowledge and ability of the proposer. Our response is made subject to condition that Deloitte enters into mutually acceptable definitive written agreement for the requested scope of services with Jefferson Parish.

## ATTACHMENT "C"

### Anti-Lobbying Form

#### CERTIFICATION OF RESTRICTIONS ON LOBBYING

I, Ragini Roy Basu, Principal, hereby certify on  
(name and title of bidder's official)  
behalf of Deloitte & Touche LLP 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 11th day of October, 2022.

By Ragini Roy Basu  
(signature of authorized official)

Principal, Deloitte & Touche LLP  
(title of authorized official)

## ATTACHMENT "C"

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.

Ragini Roy Basu, Principal

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

Deloitte & Touche LLP

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

701 Poydras Street, Suite 4200

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

New Orleans, LA 70139

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

PHONE (713)-982-2949 FAX \_\_\_\_\_

EMAIL rrbasu@deloitte.com

*Ragini Roy Basu*

\_\_\_\_\_  
Signature 10/11/2022 Date

# Request for Proposals #0447

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

### SIGNATURE PAGE

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

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

Acknowledge Receipt of Addenda: Number: 1  
Number: 2  
Number: \_\_\_\_\_  
Number: \_\_\_\_\_  
Number: \_\_\_\_\_  
Number: \_\_\_\_\_

Name of Proposer: Deloitte & Touche LLP

Address: 701 Poydras Street, Suite 4200  
New Orleans, LA 70139-7704

Phone Number: (713)-982-2949 Fax Number: \_\_\_\_\_

Type Name of Person Authorized to Sign: Ragini Roy Basu

Title of Person Authorized to Sign: Principal

Signature of Person Authorized to Sign: Ragini Roy Basu

Email Address of Person Authorized to Sign: rrbasu@deloitte.com

Date: 10/11/22

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.



Affiant further said:

Debt Disclosures

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

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

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

Affiant further said:

Solicitation of Campaign Contribution Disclosures

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

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

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

Affiant further said:

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

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

Affiant further said:

Subcontractor Disclosures

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

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

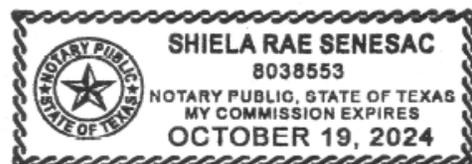
**Choice B** X There are **NO** subcontractors which would require disclosure under Choice A of this section.

Ragini Roy Basu  
Signature of Affiant

Ragini Roy Basu  
Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME  
ON THE 11<sup>th</sup> DAY OF OCTOBER, 2022.

Shiela R. Senesac  
Notary Public



SHIELA R. SENESAC  
Printed Name of Notary

8038553  
Notary/Bar Roll Number

My commission expires 10-19-24.



The services will be performed in accordance with the Statement on Standards for Consulting Services issued by the American Institute of Certified Public Accountants (the "AICPA"). However, the performance of the services will not constitute an engagement to provide audit, compilation, review, or attest services as described in the pronouncements on professional standards issued by the AICPA or the U.S. Public Company Accounting Oversight Board and, therefore, Deloitte will not express an opinion or any other form of assurance with respect to any matters (including, without limitation, compliance with U.S. GAAP, IFRS and SEC rules and regulations).

Our proposal is being made subject to the conditions that Deloitte Risk and Financial Advisory and the Jefferson Parish Government subsequently reach and enter into a mutually acceptable definitive written agreement for the proposed services and (b) Deloitte Risk and Financial Advisory completes, to its satisfaction, its standard client acceptance and continuance procedures with respect to this proposed engagement.

**About Deloitte**

Deloitte refers to Deloitte & Touche LLP, which is a subsidiary of Deloitte LLP. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.