

# Emergency Management Consulting Services

City of Key West, Florida

Request for Proposal #002-20  
Due December 18, 2019 at 3:00 pm EST

Prepared By  
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December 17, 2019

**Cheri Smith**  
**City Clerk**  
**City of Key West, Florida**  
**1300 White St.**  
**Key West, FL 33040**

Ms. Smith

Hagerty Consulting, Inc. (Hagerty) is a nationally-recognized emergency management and homeland security consulting firm dedicated to helping our clients prepare for and recover from disasters. Having worked with Florida local governments and other similar clients in the past, we understand the need for contractor-supported recovery from all types of disasters and emergencies. We have executed this range of services for clients across the State of Florida and around the United States (US), and we are confident in our ability, along with our partners, to both provide this support to the City of Key West (the City) and make sure the City is a top priority. Hagerty is pleased to partner with AC Disaster Consulting, CSRS, Inc., CSA Group, and Anchor CEI on this engagement.

Hagerty specializes in helping communities prepare for and recover from disasters; it is all that we do. We believe the Hagerty Team is the right vendor for the City for the following reasons:

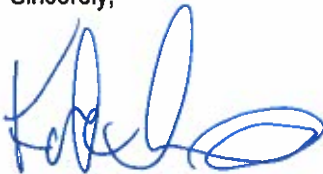
- 1. We are a national leader in disaster recovery.** We have managed over \$24 billion in disaster recovery funds since Hurricane Katrina, including the largest portfolio of Section 428 Public Assistance Alternative Procedures (PAAP) Pilot Program-related projects in the country. Hagerty offers the City the architects of the strategy used to successfully execute a similar scope of work (SOW) for the New York City (NYC) School Construction Authority (SCA) following Hurricane Sandy, which successfully increased federal funding by more than **\$3 billion** above initial Federal Emergency Management Agency (FEMA) estimates. We helped shape the 2018 national Section 428 PAAP Direct Administrative Costs (DAC) policy which allows for increased funding through a percentage-based DAC reimbursement. Our NYC client has referred to Hagerty as an “outstanding return on investment.”<sup>1</sup> Additionally, we are working with the Florida Division of Emergency Management (FDEM) to implement the new Section 324 Management Cost procedures authorized by the 2018 Disaster Recovery and Reform Act (DRRA). Hagerty’s clients were among the first to receive awards for Section 324 Management Costs for Hurricane Michael.

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<sup>1</sup> <http://www.capitalnewyork.com/article/city-hall/2014/09/8552911/city-expand-sandy-consulting-contract>

2. **The Hagerty Team offers The City the depth and breadth of policy and program management expertise required to address all of the City's recovery needs.** The Hagerty Team offers more than 700 professionals who have best-in-class expertise in all components of disaster recovery. By selecting the Hagerty Team, the City gains Hagerty's expertise in financial and grant management systems and processes; FEMA policy; the US Department of Housing and Urban Development (HUD) Community Development Block Grant-Disaster Recovery (CDBG-DR) program; and disaster recovery program management. The City also gains innovative solutions to support grant application and management, like our Disaster Financial Management System (DFMS) to support existing accounting systems, increase visibility in cost recovery, enhance financial and cash flow management, and supplement document management to support audit-ready closeouts. With Hagerty, the City benefits from complete incident management expertise and experience capable of supporting preliminary damage assessments (PDA) through closeout and all tasks in between.
3. **We know Florida.** Hagerty has extensive experience in recovery and in Florida. Hagerty's Florida experience includes recovery support following the historic 2004 hurricane season and support for Collier County following Hurricane Irma. Our firm is currently supporting the recoveries of Panama City, Panama City Beach, Bay District Schools, and several other clients after Hurricane Michael. We offer highly-qualified, Florida-based recovery professionals supplemented by a nationwide cadre of personnel with expertise in disaster recovery, engineering, accounting, and cost estimating (among other areas). Additionally, Hagerty has a strong relationship with FEMA headquarters (HQ), FEMA Region IV, and FDEM, and will leverage that partnership to benefit the City's recovery.
4. **We will support the City's overall emergency preparedness through plan updates, trainings, drills, and exercises.** Hagerty's professionals have successfully performed more than 400 projects, including numerous plan updates, trainings, and exercises. We offer the City industry-leading experience in designing trainings and exercises in alignment with the Homeland Security Exercise and Evaluation Program (HSEEP). Our subject matter experts apply real-world experience responding to disasters to the development of courses and exercises covering the National Incident Management System (NIMS) and Incident Command System (ICS). Hagerty is well-equipped to be a comprehensive partner supporting the City's emergency preparedness.

Sincerely,



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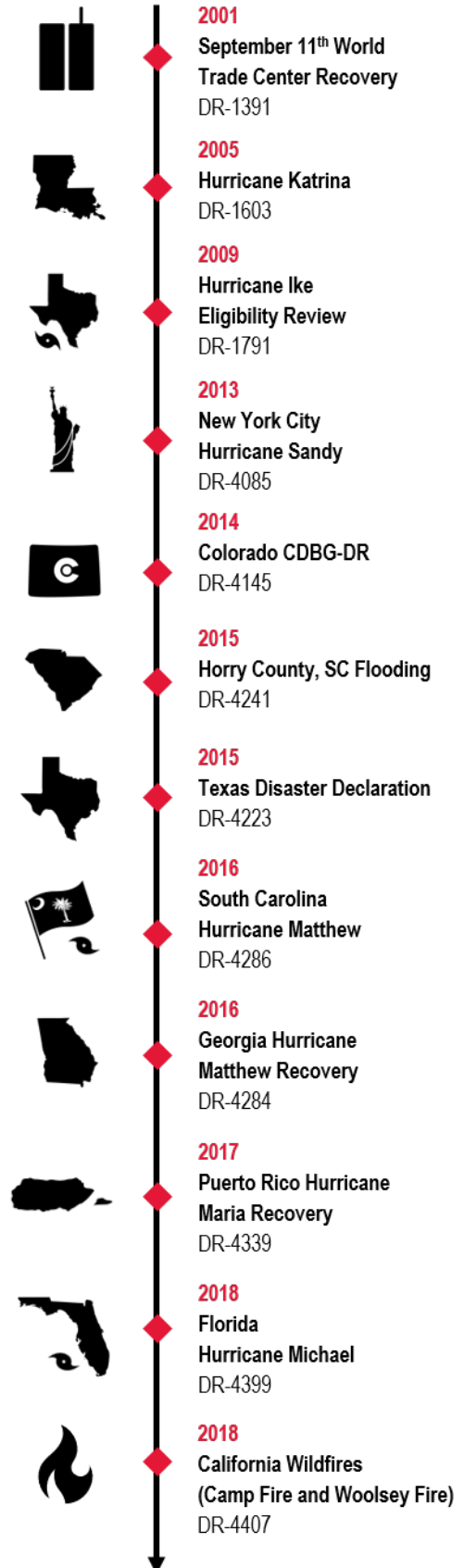
# Response to the RFP

Hagerty Consulting, Inc. (Hagerty) is a nationally recognized emergency management and disaster recovery consulting firm dedicated to helping our clients prepare for, respond to, and recover from disasters. Our firm's President and Founder, Steve Hagerty, began his career supporting public sector clients, and shortly after starting the firm was asked to support New York City (NYC) to recover from the terrorist attacks of September 11th. Over the course of the next two years, Mr. Hagerty and our professionals managed and programmatically closed out \$7.4 billion in federal recovery funding.

Since then, our professionals have rapidly deployed and supported some of the largest and most complex recovery efforts in the US, including the 2004 Florida hurricanes (Charley, Frances, Ivan, and Jeanne); Hurricanes Katrina and Rita; the Deepwater Horizon oil spill; and Hurricanes Sandy, Maria, Irma and Michael. Our approach to recovery successfully enables grantees and sub-grantees to claim eligible costs, minimize appeals, reduce administrative burden, and prepare for closeout. Through our past performance, Hagerty offers the City of Key West (the City):

- » **Proven ability to maximize recovery outcomes** which enables our team to focus on eligibility, project completeness, and advocacy;
- » **Customizable technology systems** that enhance our ability to manage the program and monitor funding across multiple federal grant programs;
- » **Technical expertise in recovery programs** which offers the City access to senior advisors for multiple federal recovery programs, including Individual Assistance (IA), Public Assistance (PA), Community Development Block Grant-Disaster Recovery (CDBG-DR); and
- » **Resilient and sustainable approach** that incorporates hazard mitigation and resiliency into eligible projects.

Since our founding in 2001, Hagerty has been instrumental in program management at all levels of government in the wake of major domestic disasters. This includes long-term deployments to support our clients in the field; not only did we deploy under the federal disaster recovery contract (PA-TAC) contract following Hurricane Katrina to support recovery across the gulf coast, we were directly embedded in recovery operations at the local level for four years. Hagerty is pleased to present our technical response to the Request for Proposal (RFP).



# ORGANIZATION INFORMATION

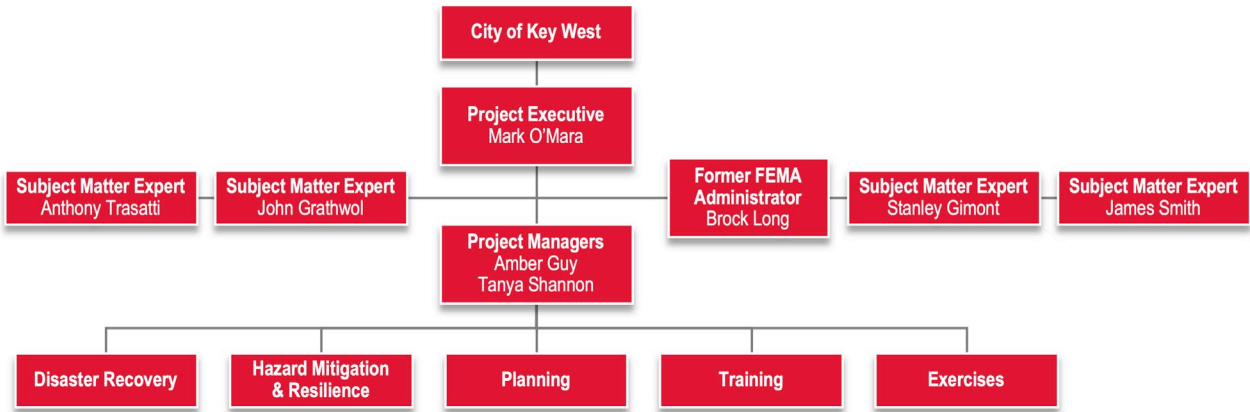
Hagerty has presented the requested organizational information in the table below.

### Hagerty's Organization Information

Question	Hagerty Response
Number of employees	Hagerty employs 125 full time professionals and can draw from our cadre of 1,000 independent contractors.
History	Hagerty was founded in 2001 and incorporated on July 12, 2002.
Service Areas	Hagerty is a comprehensive emergency management firm assisting clients with planning, training, exercises, hazard mitigation, and federal grant management across a wide range of subject areas. Hagerty advises clients on preparedness, response and recovery to active threat, flood, earthquake, fire, and hurricane events.
Financial Information	Hagerty has never filed for bankruptcy. Hagerty has never passed on a bid or defaulted on an obligation due to financial inability.
Litigation	Hagerty has not been party to any litigation.
Summary of Current Workload	Hagerty is currently supporting 78 projects for 59 clients. Hagerty maintains the ability to rapidly deploy staff in the event of a disaster incident.

The success of any project is directly related to the people assigned to it. At Hagerty, the leadership of the firm is directly involved in key staffing decisions to ensure that the project executive and project manager have the requisite experience as well as the intangible ingredients necessary for creating a team with synergy. **We also ensure that all key team members are committed to working on the project and seeing it through to completion.** The following presents the overall organization of the Hagerty team. Each of our individual team member's outstanding qualifications can be found under Appendix 1, where Hagerty has attached their resumes.

### Example Organization Chart



### Hagerty's Team Partners

Hagerty has teamed with **AC Disaster Consulting (ACDC)** to meet the City's recovery needs. ACDC brings over 14 years of experience in disaster recovery and emergency management consulting services for local, state and federal agencies. The ACDC team provides professional services in Federal Emergency Management Agency (FEMA) programs, CDBG-DR, grant administration, Natural Resources Conservation Service (NRCS), project and program management, planning, policy development, compliance and monitoring, document management, and closeout. AC Disaster Consulting is a minority-owned certified Women's Business Enterprise (WBE) and Historically Underutilized Business (HUB).

**CSRS, Inc.** (CSRS) is an experienced firm that provides professional management and design services for the delivery of disaster recovery management for infrastructure, housing, facilities, and private developments for clients throughout the Gulf Coast Region. Their professional services include grants management, project management, program management, engineering, architecture, surveying, and planning. CSRS has successfully stewarded more than \$5 billion of recovery funding. CSRS consulted in the formulation and negotiation of two precedent-setting agreements with FEMA: a \$1.8 billion settlement for Orleans Parish, Louisiana, schools and a \$1.2 billion settlement for roads and sub-surface infrastructure for the City of New Orleans, Louisiana.

**CSA Group** (CSA) is consistently ranked by Engineering News Record (ENR) among the Top 50 Program Management and Top 100 Construction Management (CM)-for-Fee Firms in the US. CSA offers clients a strong engineering, environmental and architectural design history with project delivery services that include feasibility studies, project commissioning, maintenance and operations, fund management, and response, recovery and resilience services. From evaluation of critical infrastructure and technical assessments to design and construction repair activities, CSA works closely with local, state and federal organizations to manage, document and coordinate work to ensure recovery of all eligible costs and build back, better and more resilient communities.

**Anchor CEI, Inc.** (Anchor) is a woman owned, full service engineering firm that delivers construction engineering and inspection services to the federal government, state and local municipalities. Anchor provides quality service, effective communication, and a superior product in a timely manner that meets the specific needs of our clients. With over 32 years of experience working in Florida, Anchor constantly strives to be a company that delivers an outstanding work product for all clients.



## QUALIFICATIONS

Hagerty has managed more than \$24 billion of federal disaster recovery funding with zero adverse audit findings from the US Department of Homeland Security (DHS) Office of the Inspector General (OIG). Since Hagerty’s inception, we have supported recoveries across a variety of geographic areas and sizes – mostly at the municipal level – ranging from thousands of dollars to billions in federal grants. In the interest of producing a concise proposal, the table below provides a sample of Hagerty’s experience and magnitude of experience supporting municipalities in their recoveries.

### *Hagerty’s Successful Federal Reimbursements*

Hagerty Municipal Client	Hagerty Services	Recovery Size
Town of Surfside, SC	Disaster Recovery and Mitigation	\$12 million
City of Wilmington, NC	Disaster Recovery	\$25 million
Chatham County, GA	Disaster Recovery and Mitigation	\$30 million
Howard County, MD	Disaster Recovery	\$28 million
City of Austin, TX	Disaster Recovery	\$4 million
City of Santa Rosa, CA	CDBG-DR Disaster Recovery Support	\$66 million
New York City, NY	Disaster Recovery, including CDBG-DR and Mitigation	\$15 billion
Horry County, SC	Disaster Recovery	\$15 million

Hagerty Municipal Client	Hagerty Services	Recovery Size
City of Grand Prairie, TX	Disaster Recovery and Mitigation	\$3.5 million
Boulder County and the City of Longmont, CO	CDBG-DR Disaster Recovery Support	\$60 million

### **Hagerty’s Successful Examples of FEMA Public Assistance Advisory Services and References**

Hagerty has successfully supported numerous clients to obtain and retain FEMA PA funding. In accordance with the instructions in Addendum 1 and the solicitation, Hagerty has presented brief information for our references here and more detailed reference information, including scope of work, under Attachment F.

#### **References**

Client	Contact Name	Phone	E-Mail Address
New York City Mayor’s Office of Management and Budget	Calvin Johnson	212-788-6024	<a href="mailto:johnsonc@omb.nyc.gov">johnsonc@omb.nyc.gov</a>
City of Panama City, FL	Jennifer Aldridge	850-872-3004	<a href="mailto:jaldridge@pcgov.org">jaldridge@pcgov.org</a>
Bay District Schools, FL	Lee Walters	850-814-9786	<a href="mailto:waltell@bay.k12.fl.us">waltell@bay.k12.fl.us</a>

## **PROGRAM APPROACH AND PRICE**

At Hagerty, we execute recovery programs to work for our clients by matching expertise, proven processes, and tailored systems to support the recovery operation. To support the needs of the City, Hagerty will:

- » Assign personnel who have successfully managed similar projects in the past;
- » Initiate our support using processes that have worked for similar clients and similar disasters; and
- » Train City personnel and, when applicable, hire and subcontract locally to execute with local expertise.

Our goal is to build capacity within City personnel and systems, increase the resilience of the City’s infrastructure, and recover all costs the City is eligible for under the federal recovery programs. The following presents our approach to disaster recovery, Comprehensive Emergency Management Plan (CEMP) planning, and exercise development and execution, followed by our answers to the City’s specific questions.

### **Hagerty’s Approach to Recovery**

Hagerty believes in properly starting up a project with our clients, establishing expectations early, and implementing regular communication so that the client has a clear understanding of project status and issues can be identified and addressed quickly. To ensure each task order issued by the City is managed with the highest degree of professionalism and quality, we will implement a project management approach that is dynamic, scalable, and executable—promoting efficiency and effectiveness to meet any and all pre- or post-disaster needs of the City. To succeed under this approach, Hagerty will make sure all stakeholders have a clear understanding of the following: our Project Management Plan (PMP), conditions of satisfaction, time completion schedule, quality control measures, and final product deliverables.



### ***Our Dynamic Approach to Project Management***



#### ***Project Initiation and Administration***

During this phase, our project executive will work expeditiously with City officials to understand the magnitude, onset, duration, size and impact of an imminent, occurring, or predicted emergency event or non-disaster project. Based on these factors, Hagerty will:

- » Quickly conduct an initiation meeting with the City and impacted community leadership to develop a customized and thoughtful Scope of Work (SOW). During this meeting, the conditions of satisfaction will also be discussed, reflecting the critical factors that must be successfully accomplished in the eyes of the client.
- » Develop a detailed PMP that will be employed by Hagerty and the City to monitor risks, start and finish dates, and status of activities, deliverables, and corresponding consumption for each work stream. It will also delineate assignment of functions, quality assurance protocols, and acceptance and completion criteria.

#### ***Team Assembly and Deployment***

Upon the development and approval of the SOW, our project executive will assemble and deploy an experienced and specialized team to accomplish all identified goals and objectives. Hagerty understands that not all task orders will require the full cadre of labor category positions proposed; however, we will identify tailored staffing patterns to fit each unique task need.

Hagerty knows the importance of effectively and quickly responding to emergency task orders initiated under a contract. To properly identify necessary staff for each individual engagement for the City, Hagerty will leverage the following approach to assess each task order and to identify staff to meet those requirements.

#### ***Task Order Management Process***



#### ***Response Times for Travel***

Many of Hagerty's current contracts require 24-hour on-call support and emergency deployment provisions. Our responsiveness and proven ability to commit expert resources during and after disasters is evidenced by our ongoing relationships with FEMA, other strategic partners, and our clients. The Hagerty project executive will work directly with the City to identify response timeframes for all task orders.

#### ***Ongoing Project Management and Quality Control***

At Hagerty, it is our desire to provide clients with work products and solutions that meet or exceed their expectations. Hagerty understands that a project is a collaborative effort, and to provide the City with as much visibility as possible, we will regularly provide project status reports, preferably presented verbally, but always in writing. These reports cover all activities planned or completed for the reporting period, a dashboard indicating our assessment of the project's

health, a risk and issues section, a decision and considerations section, a deliverables page describing the deliverable, date, action required, owner and status, and a budget analysis showing actual expenditures to date versus budget. The elements of the status reports are discussed at the kickoff meeting with the client. Hagerty also employs an in-house graphics and editorial staff who will be engaged for key deliverable reviews, ensuring templates and design standards are aligned with City requirements and that all documents are grammatically accurate.

### ***Execute Project***

Upon the implementation of quality control measures, the Hagerty Team will execute project work based on the approved SOW and time schedule. The project manager will ensure our flexible and dynamic project management approach is followed and that deliverables are presented with the highest degree of expertise and quality. Upon completion of all SOW elements, the Hagerty project manager will conduct closeout meetings with relevant project stakeholders to ensure that all milestones, timeframes, and expectations are met. All final project materials will be provided to the client at this meeting unless amendments need to be administered to fully satisfy the City.

### ***Pre-Disaster Initiation, Training, and Exercise***

After the award of the contract, Hagerty will have Preparedness, Response, and Recovery team leads meet with the City. They will discuss strengths and areas of improvement identified in previous After-Action Reports/Improvement Plans (AAR/IP) from prior disasters and exercises as well as other areas the City is seeking planning, internal policy and procedure review, training, and exercise assistance prior to the next disaster. Hagerty will speak about common areas of improvement across the country to see if additional assistance is needed in areas not previously exercised or tested. Hagerty has extensive experience reviewing internal policies and procedures, during emergency and long-term recovery periods, and providing recommendations to expedite funding reimbursement from both FEMA and FDEM. Hagerty will take these identified areas of improvement and develop a training and exercise plan for the City's approval. After City approval, Hagerty will implement the training and exercise plan in accordance with the agreed-upon timeline. Hagerty has experienced trainers and exercise developers/facilitators that were key trainers in the "The New Public Assistance" roll out by FEMA in 2017 and have experience in facilitating all types of exercises, including the State of Florida's Statewide Hurricane Exercise.

Hagerty's Response and Recovery Team Leads will work with the City to identify activation procedures, roles, and responsibilities to support during potential disasters including both notice and no-notice events.

### ***Post-Disaster Project Initiation and Administration***

Upon activation of Hagerty by the City, Hagerty's Response and Recovery Teams will begin support for the City. Our approach is presented below.

### ***Preliminary Damage Assessments (PDA) and Initial RPA***

Upon activation of our contract, Hagerty will provide immediate support to the City with the FEMA PDA process for both IA and PA. Our professionals will assist the City in developing a comprehensive understanding of and the required documentation of the magnitude, severity, impact, and extent of the disaster, and can utilize the FEMA Damage Inventory Spreadsheet (from Grants Portal) to minimize duplicative efforts later in the recovery. In alignment with the City's needs, Hagerty's Team may:

- » Develop and establish operational timelines, strategies, and priorities in collaboration with FEMA;
- » Participate in joint FEMA/City meetings, briefings, and field surveys;
- » Prepare and obtain incident related geographical, demographic, insurance, and historical documentation;
- » Participate in formulating repair/replacement cost estimates and identifying special considerations;

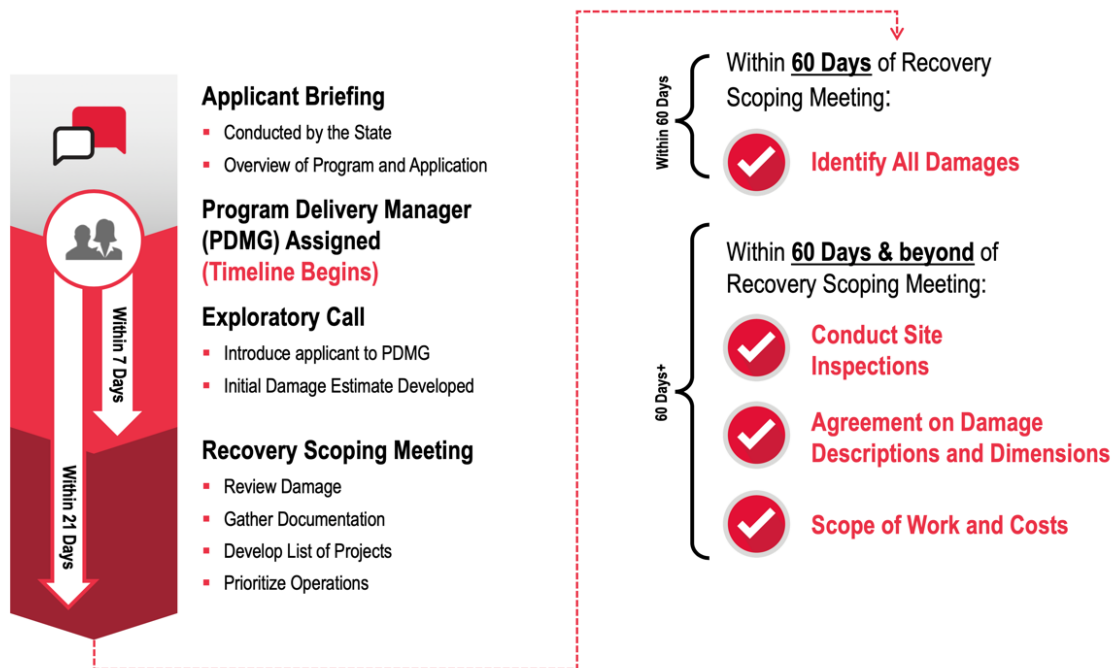
- » Support the development, reconciliation, maintenance, and update of the PDA Report; and
- » Obtain, analyze, and gather field documentation, including gathering relevant records (including timekeeping and assignment records) to extract pertinent information.

Upon a Federal Declaration, Hagerty will support the City to file an initial RPA via FloridaPA.

### **FEMA's New PA Delivery Model**

The most important new development in FEMA PA is the new PA Delivery Model. The new model includes the use of the Product Delivery Manager (PDMG) role for the primary interface between the City and FEMA. The Recovery Scoping Meeting (RSM) triggers the 60-day regulatory timeline to identify damages. Hagerty has experience in writing the Damage Inventory in such a way to give "wiggle room" if additional damages are identified after the 60-day deadline. The new Model also features new timelines for identification of eligible damages within 60 days of the Recovery Scoping Meeting. Hagerty's professionals will provide support to the City at every step, as outlined below.

#### **New Addition to PA - The New PA Delivery Timeline**

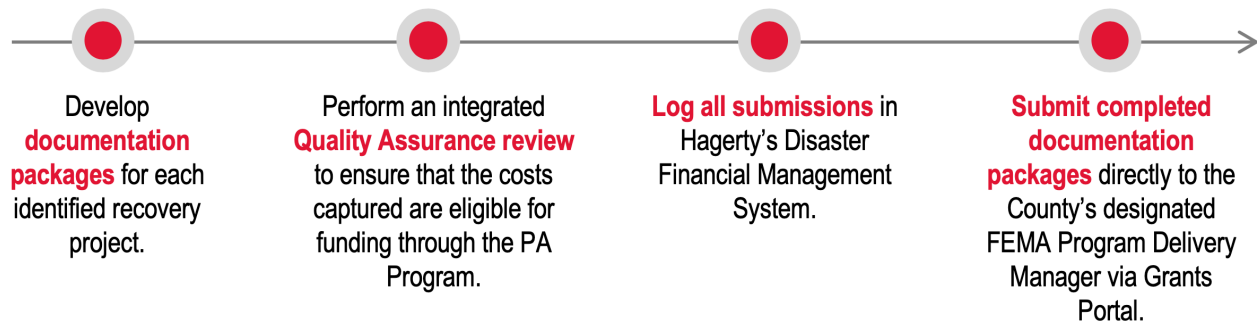


In addition to offering significant expertise in the Stafford Act, the Post Katrina Emergency Reform Act (PKEMRA), the Sandy Recovery Improvement Act (SRIA), and the new Disaster Recovery Reform Act (DRRA) legislation, Hagerty understands the new PA Delivery Model and will work with the City on this and future legislative changes to address challenges. For recent clients in the Florida Panhandle, we attended the Exploratory Calls, RSMs, site visits, and weekly meetings under the new PA Delivery Model. Hagerty offered training, which allowed our clients to better understand the program prior to engagement with FEMA.

### **Grant Advisory Support and Grant Management Support**

Hagerty will work directly with the City to develop an approach to efficiently manage the flow of information. We will group recovery projects into the seven categories of work eligible for funding under the FEMA PA Program, and break each category down to individual projects that will be captured in the grant application of the PA Program. Hagerty will then compile the information necessary to complete projects, including documentation of damage, repair scope, cost estimates/summaries, and potential alternate scopes of work under Section 428. Hagerty's consultants will:

### Process Summary for Efficiently Developing and Closing Federal Grant Applications



By completing and logging these packages at the outset, Hagerty will prepare the City for grant closeout from the very beginning of project formulation. Hagerty's goal is to work with the City to develop projects that are "closeout ready" from the beginning, meaning that all projects are fully reconciled as invoices are paid. This will result in administrative efficiencies for the City, FDEM, and FEMA.

#### **Damage Description and Dimensions (DDD)**

The DDD is key to an effective and comprehensive project and results in successful project funding with FEMA. The purpose of the DDD is to identify and quantify damage, confirming it is a result of the disaster. The DDD is the basis of the PA grant and is used to develop the SOW and Cost Estimate. FEMA is responsible for the development of the DDD under the New Model, however Hagerty has negotiated with FEMA that certified Architects or Engineers hired by the City can be used to develop the DDD, after being trained by Hagerty, for more complicated damages or to expedite the site inspection process if FEMA doesn't have a sufficient number of Site Inspectors, which has been Hagerty's experience in five states at this time. This negotiated process, specifically for Hagerty clients, has resulted in a more expedited and thorough site inspection process. Site inspections completed by FEMA Site Inspectors will be thoroughly reviewed by Hagerty professionals to ensure there are no omissions or miscalculations of damages.

We will support the City to capture information on damaged facilities as soon as possible and maintain this information throughout the life of the recovery effort. Tasks may include developing a **damage assessment plan**, including coordination with FEMA, focused on high priority infrastructure. This will ensure the City, FDEM, and FEMA jointly agree to recovery priorities and outline a master schedule to guide the pace, timeline, and priority order of assessments. An important consideration during this phase will be **condemnation and replacement authority**, and we will work with the City to rapidly establish this authority and the process for making repair and replacement determinations, including identification of personnel to develop engineering studies.

#### **Grant Formulation**

As part of the pre-disaster activities, Hagerty and the City will identify documentation collection flow for the various departments within the City to identify disaster expenses and ensure all the information is aggregated to a single location to ensure not a penny is missed in recouping disaster funds.

Once a presidential disaster declaration has been made, it takes expertise, knowledge, tactical decision-making, and programmatic acumen to obtain all the funding that an applicant is entitled to receive. This includes coordination across multiple disaster programs, almost all of which require an application to the responsible federal agency.<sup>2</sup> Hagerty

<sup>2</sup> There are more than sixty federal programs that provide funding to recover from disasters. Each program brings with it its own administrative requirements, and often the policies and regulations between programs do not align.

understands these programs and the policies and regulatory requirements that govern cost estimating, project cost accounting, insurance, hazard mitigation, floodplain management, and environmental and historic preservation (EHP) requirements. We will achieve success for the City by developing robust applications, which will minimize ineligibility determinations and limit common issues. Additionally, Hagerty will work with the various Federal and State agencies to layer funding streams to ensure the smallest Local Cost Share of the various funding programs.

Our approach to grant formulation begins with development of SOWs and extends through Quality Assurance/Quality Control (QA/QC) reviews to ensure grants are as comprehensive as possible. As a reimbursement program, it is critically important that the SOW developed for projects are accurate, clearly written, and complete. Our multi-disciplinary Team knows federal disaster recovery programs, design standards, Florida Codes and Standards, and appropriate construction methods to support the City to develop accurate SOWs. Further, our subject matter expertise will formulate projects by “logically grouping” work, aligning projects with business processes implemented by the City to facilitate enhanced recovery outcomes. During this process, Hagerty will review and identify opportunities for hazard mitigation (under both 406 and 404 authorities), and our professionals will make maximizing the amount of hazard mitigation funding the City receives a top priority. In practice, our professionals have developed 406 Hazard Mitigation Proposals which, in some cases, exceeded 100 percent of the repair cost eligible through the PA Program.

Hagerty’s professionals will support the City to account for important considerations, including:

- » **Cost estimation accuracy**, which are critically important when designing projects, implementing the Section 428 Public Assistance Alternative Procedures (PAAP) Pilot Program, and executing alternate or improved projects under the PA Program. We have an in-depth understanding of FEMA’s Cost Estimating Format and will work with the City to ensure all assumptions and considerations are consistent and applicable to the actual conditions of the City including identify local costs which most likely exceed RSMMeans unit costs, the standard reference for FEMA PA Costing Specialists, in a post-disaster environment.
- » **Alternate Projects and Improved Projects**, which may allow the City to utilize federal funding in a way that provides greater flexibility and benefit than standard in-kind repairs. Proactive management will allow the City to make alterations and/or improvements while restoring the damaged facility or even constructing an entirely different facility.
- » **The PAAP Pilot Program**, authorized under SRIA, which allows FEMA to make recovery grants for permanent work (Categories C-G) projects based on fixed cost estimates. Hagerty will support the City to use the Program, including how to minimize the risk of accepting a capped grant rather than receiving reimbursement on an actual cost basis.
- » **Special considerations**, such as EHP reviews, which must be kept in mind immediately after a disaster so that the City does not engage in work that is later deemed ineligible.

Quality control reviews will follow a strict process that has resulted in identification of multi-million-dollar errors in favor of our clients. We will use our QA/QC process to ensure the City is compliant with FEMA requirements and identify additional funding that might be available for the City.

### ***Evaluate Alternate and Improved Projects***

In most cases, the PA Program reimburses applicants for the completion of eligible permanent repair work on an actual cost basis. However, there are instances where applicants are reimbursed based on capped estimates under either Alternate or Improved Projects. In both cases, PA recipients require cost estimating expertise to ensure the capped grant amounts are sufficient for eligible restoration work, as follows:

- » Alternate Projects allow the applicant to use disaster recovery funds to complete projects that serve public interest better than restoring a damaged facility. A grant is made based on a capped estimate, but a 10 percent reduction penalty was recently removed with the passage of the DRRRA.
- » Improved Projects give the applicant the opportunity to make improvements beyond pre-disaster design and capacity while restoring a damaged facility. These projects are also based on capped cost estimates and require extensive cost estimating expertise.

Hagerty will advise on which capped funding approach may work best. Our assessment tools will show the City the pros and cons of pursuing capped funding, including when the Section 428 PAAP Pilot Program should be used. To date, our Teams have developed more than **\$5.8 billion** in fixed capped grants for one client alone. To support development of these grants, we developed a procedure to validate cost estimates, processes for drawdown, and procedures to leverage the full flexibility of this program. These procedures include a process for streamlining the approval of changes to the SOW for a recovery project from the original scope used to capture costs for the grant, allowing the applicant to determine the most effective use of recovery funds. Hagerty is currently working with FDEM in identifying how they are going to implement their new 428 advanced payment procedures for Hurricane Michael, establishing the precedent for future disasters throughout the state.

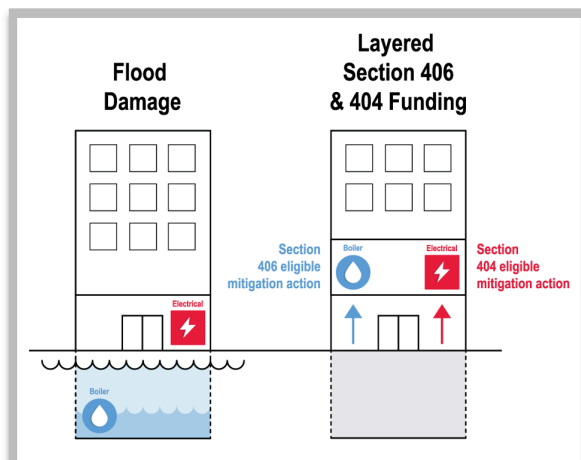
No one has more experience in current FEMA PA Pilot Programs than Hagerty.

### **Assist in the Development of Hazard Mitigation Proposals under Sections 406 and 404 of the Stafford Act**

Every PA permanent work project will be assessed for potential 406 mitigation opportunities on top of the Code and Standards requirements within the State of Florida. Our professionals understand how to maximize the available mitigation dollars under 406 for both permanent work under the standard PA program and under the 428 program for alternate projects utilizing the PA Program and Policy Guide Appendix J to seek up to 100 percent on top of the project costs in pre-approved mitigation measures and developing the Benefit Cost Analyses (BCAs) for mitigation measures not on the approved list.

Hagerty also has extensive experience in navigating FDEM's 3-Tiered approach for the 404 Hazard Mitigation Grant Program. In Bay County, 86 percent of the proposals in the Local Mitigation Strategy were written by Hagerty Mitigation Subject Matter Experts. Even during blue skies, Hagerty can support Key West in developing viable 404 projects to take advantage of funding available under the Tier 3. For a recent client, Hagerty executed a mitigation review, which resulted in 50 Section 406 hazard mitigation proposals valued at over \$250 million and expedited development of an expanded SOW for 70 additional Section 404 Hazard Mitigation Grant Program (HMGP) applications. To date, nine 404 HMGP applications have been approved, resulting in \$270 million in increased disaster resiliency measures.

#### **Layered Mitigation Funding Maximizes Resilience**



The image above illustrates a real solution crafted by the Hagerty Team. For this client, in one structure the boiler was damaged, but the electrical annex was not. Our Team identified that both the boiler and electrical annex are vulnerable in a future flood event, and therefore recommended both be elevated. Under this scenario, Hagerty developed a policy-based justification and a grants package to combine Section 404 and 406 funding to address both needs. As applied across the UT System, these types of solutions would address both past and future damage, allowing facilities to be made more resilient.

### ***Support the City's CDBG-DR Program***

Hagerty has a diverse background in assisting disaster-impacted communities eligible to receive CDBG-DR funds for long-term recovery needs following a major disaster. Because of our understanding of these programs, we offer the right professionals across all program phases, from development of an Unmet Needs Assessment (UNA) to project closeout.

- » **Unmet Needs Assessment and Action Plan Development:** In order to support the allocation of CDBG-DR funds, the UNA outlines the type and location of community needs, enabling the City to target limited resources to those areas with the greatest need. The UNA must evaluate three core aspects of recovery: housing, businesses and the economy, and infrastructure. Our professionals will collect, review, and analyze data and incorporate resilience and mitigation to craft a robust assessment of unmet needs.
- » **Program Implementation:** Overall technical assistance provided during program implementation may include development of the CDBG-DR Action Plan and support to execute the Action Plan. Staffing during Program Implementation will be contingent on the needs of the City. For example, if the greatest unmet needs are around housing, we may provide staff with deep experience in housing rehabilitation programs.
- » **Program Monitoring:** An important part of program monitoring will be preparing the City for HUD and state monitoring, and establishing appropriate methods early in Program Implementation is important to assure the overall success of recovery. The Hagerty team will follow the procedures outlined by HUD for monitoring all CDBG and CDBG-DR activities. In addition, we will conduct an initial risk assessment to determine program risk factors and financial management capacity. After determining risk, we will establish a schedule to regularly monitor risk and provide additional technical assistance to build capacity.
- » **Program Closeout:** In order to support Program Closeout, Hagerty will first file closeout forms on completed projects, including final quality control reviews to ensure all appropriate documentation is captured. We will also provide technical assistance to the City to assure the staff understands required reporting systems.

### ***Proactively Identify and Resolve Issues***

Hagerty excels at the identification and resolution of eligibility, policy, reimbursement, and overall grant management issues related to the FEMA PA Program, and our strategic process to do so differentiates Hagerty from our competition. We are proactive and innovative, tailoring our solutions to the client's specific priorities, organizational structure, and risks. Upon award of this contract, Hagerty will:

- » Complete a risk assessment of projects, damages, and claims to identify and prioritize high risk, high dollar, and soon-to-be-started projects;
- » Develop resolution strategies that eliminate or reduce the risk of federal non-compliance, adverse audit findings, ineligibility determinations, and disallowance of funding; and
- » Develop a multi-tiered QA/QC review process of all project worksheets (PWs), which also accounts for issues that impact other funding sources.

Hagerty believes the City will be best served and benefit most from federal grant programs when all stakeholders are working toward common goals and desired outcomes. We have an unparalleled record supporting our clients in their FEMA claims and aim to do so in the most efficient way possible. As one component of this, Hagerty will work to proactively demonstrate eligibility utilizing strong policy and innovative substantiation techniques as opposed to reactive and inherently deficient appeal responses.

### **Risk Management Coordination**

Hagerty's approach to recovery is complete and comprehensive. We will coordinate with all facets of the City's organization to assess needs and opportunities. As an example, for a recent client we analyzed their insurance policies in light of the new "obtain and maintain" requirements as a result of a storm. Through this analysis we were able to limit the client's coverage significantly, while still remaining compliant with federal regulations. This reduced their annual insurance premiums by almost \$100 million over 10 years.

As proof of our risk management capabilities, Hagerty has supported over \$24 billion in federal recovery funding with \$0 of de-obligations as a result of DHS OIG audits.

### **Reconcile Grants and Maintain Documentation for Tracking and Reporting including FEMA's Grants Portal and FloridaPA**

Establishing processes to ensure productivity, quality, and performance are essential to effective grant administration. For the City, we will review controls to ensure adherence to all federal requirements, including the "Super Circular" titled *2 Code of Federal Regulation (CFR) Part 200: Government-wide Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, applicable to all disasters declared on or after December 26, 2014. Leveraging checklists and compliance tools, we will work with the City to implement balanced compliance by focusing our review on systems that do not track finances in accordance with federal programmatic standards.

By working closely with staff at various departments, Hagerty will ensure that all eligible PA costs are captured in a project. At the same time, Hagerty will make sure all funding streams are explored and maximized to ensure the best funding mix for all local projects. This will have the added benefit of reducing duplication of benefits (DOB) risk down the line, as all costs will be captured and associated with a funding source.

In cases where policy interpretations or insurance reductions affect the projects, Hagerty will prepare the City to defend itself with comprehensive project packages. Hagerty will track all FEMA processing of the grants via Grants Portal, including SOW and cost estimate validation, insurance reductions, Hazard Mitigation Program review, and all other process steps enabling intervention at the point any decision is made not in the best interest of the City. Even after obligation of an initial version of a project, if costs are still being incurred or new costs are identified, Hagerty will work to amend the previously obligated project.

In addition to compliance reviews, Hagerty's professionals will leverage our tracking system to monitor projects, allowing our Team to examine versions, categories, obligations, and expenditures while offering the City an overall snapshot of the PA Program. Monitoring versions, obligations, and expenditures is critical to ensuring compliance with overall PA Program regulations and advancing recovery activities based on available funding. We will also work with the City staff to establish a streamlined payment process by developing mutually agreeable documentation requirements, aligned with FEMA and existing the City practices. This will ensure the payment process is efficient while limiting the burden on current municipal staff.

Hagerty, additionally, has extensive experience in submitting Requests for Reimbursements (RFRs) from FDEM via FloridaPA. Hagerty's clients from Hurricane Michael were some of the first to submit Expedited Projects under FDEM's new policies and procedures and submit RFRs for portions of the dollars validated by FEMA and FDEM prior to obligation. In Hagerty's experience, this requires continued tracking and advocacy with each project to ensure that dollars are released to the Applicant incrementally rather than waiting for 100% validation which may take months on large projects. Hagerty successfully had over \$37 million obligated dollars released by FDEM and deposited with Hagerty Clients within 4 months of initiating work for Hurricane Michael.



### **Appeals, Arbitration, Audit, and Closeout Support**

As a firm, we recognize that some eligibility disputes may not be immediately resolved and will result in an appeal consistent with Section 423 of the Stafford Act, 42 United States Code (USC) Section 5189a, and 44 CFR Section 206. In those cases, Hagerty brings expertise and experience in crafting winning appeals on behalf of our clients. We provide comprehensive support in the formulation of appeals as well as review and tracking PWs to ensure applicants do not lose their right to appeal due to a missed deadline. **For a recent client, we won an appeal for more than \$2 million to replant trees that were used for natural filtration and anti-erosion on the banks of a large reservoir.**

While we know how to structure winning appeals, Hagerty’s approach to the PA Program focuses on collaboration between local, state, and federal partners to solve problems up front rather than defaulting to appeal when FEMA makes negative eligibility determinations. Hagerty has a successful track record of minimizing the need for appeals, which makes it possible to claim all eligible costs and expedites the recovery process.

Recovering from a major disaster takes time. Properly closing out projects completes the recovery process, but there are proactive steps that can be taken to make the process more efficient. By structuring grant formulation and administration processes around the City’s internal financial management systems and preparing grant documentation consistently, we can facilitate a streamlined application, administration, and closeout process.

Hagerty’s strategy to prepare for audit starts from the very beginning of project formulation. Depending on which FEMA Validation Specialist or Costing Specialist is writing/validating a project, there may be a wide range of level of detail in the final product. While some high level PWs are detailed enough for obligation, they may be inadequate when reviewed by an auditor. Hagerty strives to prepare highly detailed, audit-ready projects that contain accurate information at a high level but also the necessary supporting documentation to validate the information in the project. That effort, combined with thorough document management, has allowed Hagerty clients to avoid adverse audit findings.

## **Hagerty’s Approach to Planning**

A dynamic emergency management plan must be flexible and scalable for use during, and following, all types of emergency and disaster events. In partnership with the City, Hagerty can develop and update a variety of plans, including but not limited to emergency operations plans (EOPs), standard operating procedures (SOPs), and field operations guides (FOGs). Our capability includes offering professionals with significant expertise across emergency support functions (ESFs) capable of supporting a multitude of operational planning areas, including mass care, cyber, evacuation and sheltering, hazardous materials (HazMat), rail transportation, and dam safety.

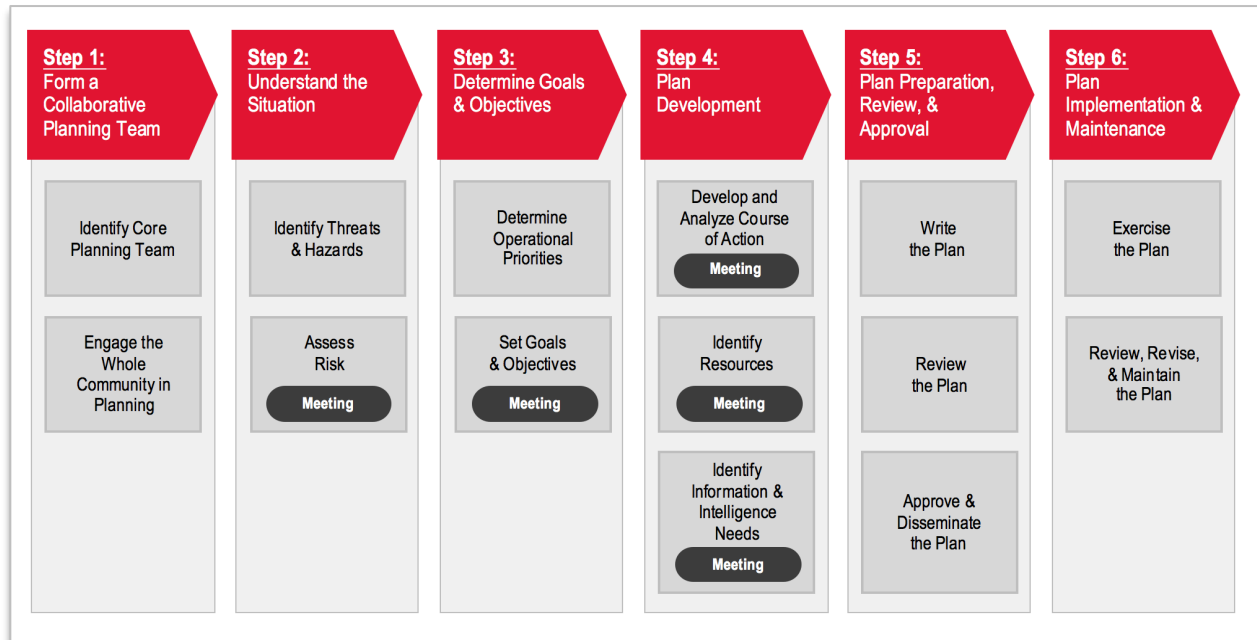
### ***Specific Emergency Operations Planning Support Services***

#### **Types of Planning Support Offered by Hagerty**

- |  |  |
|--|--|
| » Emergency Operations Planning                          | » Incident Action and Special Events Planning            |
| » Critical Infrastructure/Key Resource (CIKR) Planning   | » Logistics Planning                                     |
| » Regional Catastrophic Planning                         | » Mass Casualty/Care and Mass Fatality Planning          |
| » Cybersecurity Planning                                 | » Public Health and Medical Planning                     |
| » Functional Needs Support Services (FNSS) Planning      | » Emergency Public Information and Social Media Planning |
| » Crisis Communication and Citizen Preparedness Planning | » Household Pet Planning                                 |
| » Incident Specific Planning                             | » ESF Planning   |

Hagerty's planning process is consistent with FEMA's Comprehensive Preparedness Guide 101 (CPG 101), and our professionals have been engaged in developing plans to gain accreditation under the Emergency Management Accreditation Program (EMAP).

### Steps in the CPG 101 Planning Process



Over time, the City may need support to update its EOPs or assess its emergency management programs. Hagerty's professionals are skilled at conducting assessments; identifying opportunities for improvement; and facilitating change for our clients to enhance emergency management programs. Whether focused on preparedness or recovery, these sessions and outcomes target key areas for improvement and present priorities for operational improvement.

### Approach to CEMP Planning

Hagerty's objective for the updated Key West CEMP will be to provide context for a common, coordinated, unified approach for responding and recovering from emergency incidents. To develop the CEMP, Hagerty will follow an iterative planning approach with up to six in-person planning meetings with the City, supplemented by meetings with subsets of City staff to focus on critical issues specific to the base plan and supplemental tools. Hagerty proposes that supplemental planning meetings be held both in-person and via webinar to maximize stakeholder engagement.

Hagerty is well recognized for our ability to develop consensus. Hagerty has been assisting the City of Panama City, Florida with long-term community recovery as a result of Hurricane Michael. To inform the long-term recovery plan, Hagerty facilitated a week-long public engagement effort to gain consensus on priorities for long-term recovery, including how to rebuild the downtown area. As with any recovery, tensions were high and many of stakeholders had divergent visions. However, after engaging nearly 20 cross-sections of the community across focus groups and town halls, Hagerty was able to develop a long-term recovery vision and plan for the City. **The Mayor and City Manager have publicly recognized and applauded Hagerty's facilitation approach that led to the development of a suite of community recovery planning documents.**

Having reviewed relevant plans and documented capabilities following a Kick-Off Meeting, Hagerty will enter the planning process with a keen understanding of risks, impacts, and capabilities, and priorities to incorporate into the CEMP. Further, we will understand planning and regulatory strengths and opportunities for improvement, available resources, and communication systems critical to preparedness, response, and recovery in the City. This information

will be leveraged to support a series of planning meetings (which includes activities related to the development of the Base Plan, ESF/Recovery Support Function (RSF) checklists, hazard specific annexes, local templates, and Strategic Implementation Plan), as outlined below.

**Planning Meeting 1 (Documentation Verification and Vision Development Meeting):** Hagerty will facilitate a planning meeting with the City to understand where the City and its partners are in the need to update the existing plan. The meeting will also include a review of possible documentation that the Hagerty planning team will need to review in order to ensure that the newly develop CEMP is informed by current plans. To support the collection of documentation, Hagerty will developing a Planning Matrix Tool that will serve as a baseline assessment of all current plans as well as planning gaps. The Planning Matrix Tool will be finalized no more than 20 days following Planning Meeting 1.

**Planning Meeting 2 (Base Plan Structure Development Meeting):** Following the review of current plans and the completion of the Planning Matrix Tool, Hagerty will facilitate a meeting that is focused on confirming the structure of the updated plan. Hagerty will leverage the output of this meeting to develop the draft Base Plan of the CEMP.

**Planning Meeting 3 (Base Plan Review and Supplementary Tool Development Meeting):** To ensure that the draft CEMP Base Plan is meeting the goals of the City, the Hagerty planning team will conduct a three-hour planning meeting that reviews the development of the plan to date. Within this meeting, Hagerty will also facilitate discussions that begin to develop out supplementary tools to the CEMP Base Plan, including the ESF/RSF Checklists, hazard-specific annexes, local templates, and Strategic Implementation Plan.

**Planning Meeting 4 (Supplementary Tool Development Review Meeting):** The Hagerty planning team will return to the City during its fourth planning meeting to review a 90 percent complete CEMP Base Plan, along with 60 percent complete supplementary tools, including the ESF/RSF Checklists, hazard-specific annexes, local templates, and Strategic Implementation Plan. It is expected that the City provides the Hagerty planning team with recommended edits to all documents. Hagerty's planning team will keep the opportunity to provide revisions to all documents open for ten days following Planning Meeting 4.

**Planning Meeting 5 (Comprehensive Emergency Management Review Meeting):** Hagerty plans to use the fifth planning meeting to review all CEMP documentation developed as 99 percent complete, ensuring that any revisions to the documents by the City are incorporated prior to finalization. The meeting is expected to last no more than three hours. Hagerty's planning team will keep the opportunity to provide revisions to all documents open for ten days following Planning Meeting 5.

**Planning Meeting 6 (Comprehensive Emergency Management Planning Project Finalization Workshop):** As a final planning meeting, Hagerty will facilitate an orientation to the CEMP and supplementary tools developed over the course of the planning period. Following the orientation, participants of the planning meeting will be divided into groups and, using a workshop format, apply the CEMP to each of the hazards identified in the hazard-specific annexes. Through group discussions, participants will be asked to identify gaps or needs in the CEMP and supplemental tools based on their scenario. Revisions will be collected and inform the finalization of the CEMP and supplemental tools.

## **Hagerty's Approach to Training and Exercises**

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Hagerty's approach is based on our training and exercise philosophy, where the most successful programs are both programmatic and holistic. By **programmatic**, Hagerty means that training and exercises are interwoven into the everyday processes, planning, and priorities of the broader preparedness program. To be successful, the identification and execution of the training and exercise program must be based on a combination of planning priorities, identified

risks, required capabilities, and the broad strategic perspective of preparedness needs. For Hagerty, **holistic** is two-fold. First, we mean that the training and exercise program must include the full range of emergency management phases. Second, we mean the training and exercise program needs to be inclusive of all partners, both traditional and non-traditional. A strong community engagement strategy is required to ensure all stakeholders are brought to the table to train, practice, and identify solutions to bridge any capability gaps. This programmatic and holistic philosophical approach ensures that any training and exercise program designed and implemented by Hagerty is equitable and sustainable, with defined metrics that objectively reflect improved emergency response and recovery capabilities.

### **Hagerty's Approach to Training**

The Hagerty Team has experience developing training materials using both Instructional Systems Design (ISD) and elements of the Department of Homeland Security (DHS) Homeland Security Exercise and Evaluation Program (HSEEP). Both approaches are FEMA approved. Hagerty proposes to use these methods to develop trainings on behalf of the City covering NIMS and the specific key concepts of the City's CEMP. In the past several years, Hagerty has demonstrated national leadership in emergency management doctrine by supporting FEMA's National Integration Center (NIC) revise and update NIMS doctrine.

The section below describes the ISD Analysis, Design, Development, Implementation, and Evaluation (ADDIE) approach to training which Hagerty intends to use.

### **ISD ADDIE Model to Develop Training**

There are five phases to the ADDIE model that will be used by the Hagerty Team to develop training for the City.

#### **Step 1: Analysis**

During the analysis phase, Hagerty will execute a meeting with the City to present an outline of the training, understand what specific emergency management tasks and duties participants must know at the conclusion of the training, and discuss any learning management system (LMS) the City uses. After the meeting, Hagerty will develop a task sheet for the training and submit it to the City for approval.

#### **Step 2: Design**

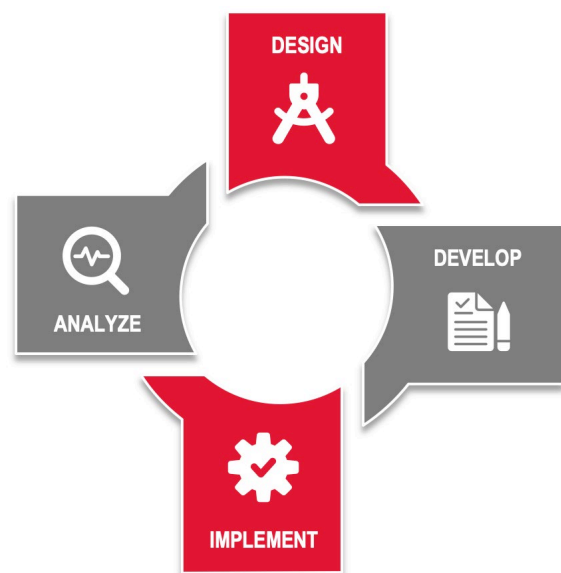
Leveraging outputs from Step 1, Hagerty will collaborate with the City to articulate, as closely as possible, the real job conditions within the instructional environment based on the tasks that will be covered in the training. This will include facilitating a meeting to execute a learning analysis (e.g. definition of the training objectives and format of evaluation); determine exam items to confirm training objectives are met; and structure for delivery of information to achieve learning objectives.

#### **Step 3: Develop**

During the develop phase, Hagerty will develop the training, along with the following deliverables:

- » **Training Structure:** A detailed timeline for the training, including start times, end times, module lengths, exercises, and exams.

**Figure 1: ADDIE Model**



- » **Training Materials:** Includes the development of lesson plans, voice-over narration, vignettes, activities, and reference materials that will be provided to participants, if applicable. Materials are based on the objectives and structure previously approved by the City.
- » **Construct Tests:** Structured to evaluate whether participants have learned enough to meet objectives.

Hagerty will present these materials to the City five days prior to executing an in-person meeting. At this meeting, Hagerty will review all draft materials with participants, validating content, format, and design. Ten days following this in-person meeting, Hagerty will provide final draft materials to the for review and approval.

#### Step 4: Implement

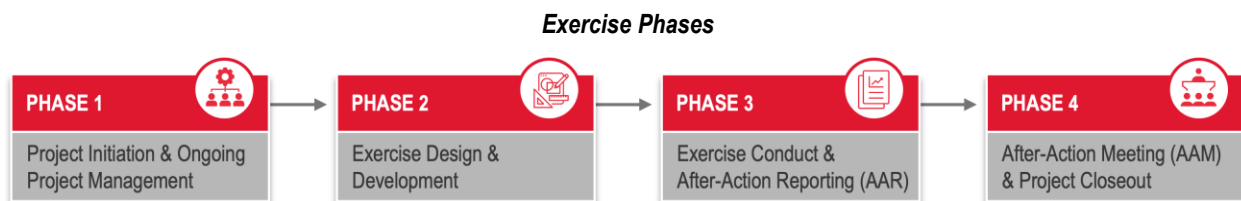
Following approval of the training materials, Hagerty will collaborate with the City to finalize the training, and, if computer-based, use Articulate 360 software, including incorporating standards associated with Section 508 and Web Content Accessibility Guide (WCAG) 2.0 compliance. To execute this Step, the Hagerty Team will:

1. Develop design treatments, including a high-level design document and screen flows and a storyboard for review. Full-color graphics can be developed, in alignment with City branding guidelines. Hagerty can support an executive video greeting, synchronize audio narration, and craft professionally-engaging flash animations. Case studies or simulations with corresponding exploratory activity can also be developed. Hagerty can ensure the final deliverable includes professionally animated title pages, lesson objective pages, flexible navigation, and embedded documentation, as desired.
2. Implement the course, with three course reviews (alpha, beta, and gold). If the course is to be offered digitally, Hagerty will upload and test the course to the City LMS, and facilitate testing prior to external release.
3. Execute a post-implementation evaluation to review use, conduct a learner evaluation survey, and provide the City with recommendations for future curriculum course design.

Upon completion of this process, Hagerty will either conduct the training in person or make the training available digitally in coordination with the City.

#### Hagerty's Approach to Exercises

In order to gain the perspective and buy-in of stakeholders, Hagerty will work with the City and associated stakeholders to form an Exercise Planning Team (EPT), which may be comprised of agencies including local law enforcement, fire, emergency management agencies, the private sector, and the relevant stakeholders. The purpose of the EPT will support the design and development of exercises to validate the plans, supplementary tools, and hazard-specific annexes. To design exercises, Hagerty will conduct three planning meetings in alignment with the best practices established under HSEEP guidance. The Initial Planning Meeting (IPM), Midterm Planning Meeting (MPM), and Final Planning Meeting (FPM) will be conducted with the EPT at a location determined by City and/or via webinar. Sign-in sheets and meeting notes will be provided to the City no more than 10 days following each planning meeting.



Over the course of the exercise design process, Hagerty will develop relevant exercise documentation, aligned with HSEEP and the materials necessary to support the exercises. This may include situation manuals (SitMans), master scenario events lists (MSELs), and exercise evaluation guides (EEGs) depending on the scope and type of exercise.

Following the FPM, Hagerty will execute facilitation of the exercise. Upon completion of exercise conduct, Hagerty will execute a “hotwash,” in which exercise participants will be asked for initial observations about what went well and what could be improved in both the conduct of the exercise and in the discussion of objectives. Hagerty will then incorporate this feedback into an AAR, including an Improvement Plan, with specific areas for improvement based on exercise feedback and results.

## **Response to the City’s Questions**

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### ***1. Hagerty Provides the Right Technical Ability for Key West***

Hagerty leads the recovery industry in innovation. Hagerty specializes in providing innovative solutions for our clients’ most complex recovery problems that are compliant and allowable under the many and significant federal regulations, policies, and requirements. We have supported our clients in overcoming issues such as accurate local cost estimating, lack of documentation, 50 Percent Rule Replacement, Permanent Relocations, legal responsibility, US Army Corps of Engineers (USACE) beach eligibility, and other critical issues which the City will face. Hagerty’s experience allows us to understand the comprehensive recovery process, not just the FEMA PA program. We have supported our clients through CDBG-DR match programs, thereby eliminating their local cost share, complex and innovative DAC solutions more than offsetting Hagerty’s contract costs, and much more. Our clients credit over \$3 billion of additional FEMA PA funding as a direct result of hiring Hagerty.

Our professionals have been at the forefront of developing and executing innovative recovery policies, methodologies, and tools in the aftermath of large-scale, complex disasters. Concepts we designed and executed for our clients have been recognized as best practices, have directly influenced new FEMA programs, and have become federal policy. These include, but are not limited to, the 428 PAAP Pilot Program for Permanent Work, the Sheltering and Temporary Essential Power (STEP) Pilot Program, and the Debris Removal Pilot Program. Hagerty understands the key consideration with each of these pilot programs is when to leverage them over traditional FEMA PA.

The Sandy Recovery Improvement Act (SRIA) of 2013 established the FEMA PAAP, frequently referred to as the Section 428 Program. FEMA created three pilot programs focusing on debris removal, permanent work, and DAC. The Section 428 Program is now the primary method of permanent work grant funding nationwide.

## **Hagerty's Experience Spans Major Legislative Changes Focused on Disaster Recovery Programs**



### **Post-Katrina Emergency Management Reform Act (2006)**

Hurricanes Katrina and Rita were devastating to the Gulf Coast, resulting in **\$161 billion** in damages and requiring the nation to rethink emergency preparedness, evacuation, and disaster housing. Hagerty supported the City of New Orleans following Hurricane Katrina under a \$140 million capital recovery program.



### **Sandy Recovery Improvement Act (2013)**

Hurricane Sandy's total damages totaled more than **\$71 billion**. Hagerty is currently supporting NYC in their recovery from Hurricane Sandy under a \$15 billion-dollar program. Our work includes implementation of recovery pilot programs authorized under the Act, resulting in the largest portfolio of active PAAP Pilot Program grants in the nation.



### **Disaster Recovery Reform Act (2018)**

The DRRA captures methods to adjust disaster recovery funding to build resilience. This includes increased pre-disaster mitigation as well as opportunities for communities to rebuild to new codes and standards – even if those codes were enacted following the disaster event. Hagerty's professionals are supporting California and Florida communities in their recoveries from wildfires and Hurricane Michael respectively, with estimated damages topping **\$38 billion**.

Hagerty has developed and managed \$6 billion in Section 428 PAAP grants — more than any other firm in the country. In addition, our professionals worked with FEMA Region II, IV, and FEMA HQ to develop and refine the applicable SOPs, guides, and disaster-specific supplemental policies related to the Section 428 PAAP Program, such as the new Hurricane Michael Section 428 PAAP Policy. We are also working with FDEM in the implementation of this disaster-specific policy and establishing procedures to draw down advanced funds for Section 428 projects for Applicants, thereby establishing precedent for future disasters.

## **2. Hagerty's Approach to Interacting with the City**

Hagerty has presented our approach to interacting with the City in our sections on project initiation, ongoing project management, and staff deployment above. In the interest of producing a concise proposal, Hagerty will not duplicate our approach here.

## **3. Location of Offices Where Hagerty Will Perform Services**

In addition to our team currently deployed in Florida, Hagerty has seven primary offices – our Headquarters in Evanston, Illinois and field offices in Washington, DC, Austin, Texas, New York, New York, Hickory, North Carolina, Sacramento, California, and San Juan, Puerto Rico. Personnel from more than one of Hagerty's physical office location may be deployed to assist Key West based on immediate need.

## **4.. Limitations Impacting Hagerty's Performance**

Hagerty has successfully deployed staff on short notice to respond to disasters. Hagerty anticipates potential difficulty mobilizing staff to the City during or immediately after a catastrophic storm event. Otherwise, Hagerty anticipates no other challenges in supporting Key West.

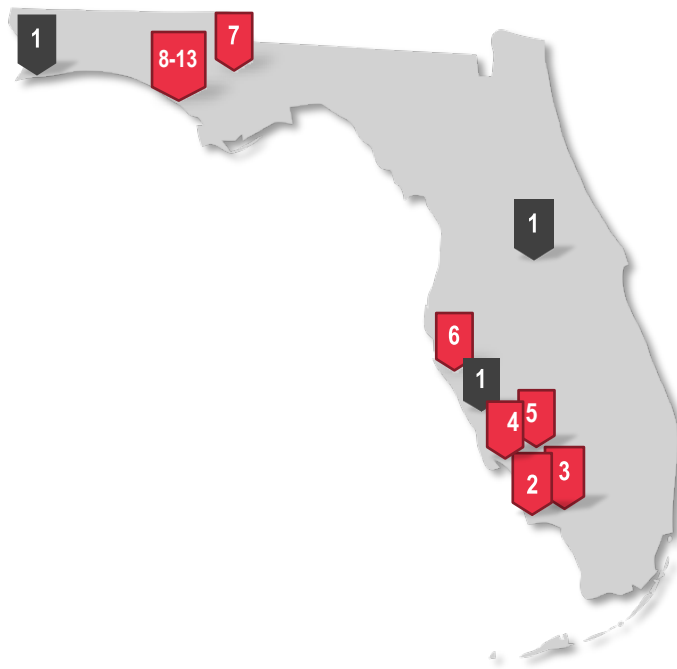
## **5. Proposed Price**

Hagerty's price proposal is presented in Attachment A – Unit Price proposal form.

### **Hagerty's Familiarity with Florida and the Florida Keys**

In addition to being a national leader in recovery operations, Hagerty has deep experience in Florida and FEMA Region IV. We have worked with FDEM and FEMA Region IV to successfully resolve a variety of eligibility, timeline, and reimbursement issues for our clients. This allows our team to leverage existing networks and relationships on behalf of the City. For example, Hagerty recently worked with FEMA Region IV to increase a grant from approximately \$90,000 to almost \$10 million for a client after Hurricane Matthew. When that partnership required additional management oversight, Hagerty worked with FEMA Headquarters to find a beneficial and compliant path to eligibility for our client. A snapshot of our Florida experience specific to recovery programs following major disasters and hurricanes is presented in the figure below.

**Hagerty's Experience in Florida**



1. 2004 Florida Hurricane Season Joint Field Office Program Support
2. Collier County Hurricane Irma Recovery Support
3. Collier County Hurricane Irma AAR and Improvement Plan
4. Lee County Regional Evacuation Plan
5. Lee County Hazard Mitigation Plan Update
6. Sarasota Memorial Hospital Recovery Support (Hurricane Irma)
7. Calhoun Liberty Hospital Association (Hurricane Michael)
8. City of Panama City (Hurricane Michael)
9. Panama City Beach (Hurricane Michael)
10. Bay District Schools (Hurricane Michael)
11. Palm Bay Education Group (Hurricane Michael)
12. Panama City Housing Authority (Hurricane Michael)
13. Bay Haven Charter Academy (Hurricane Michael)



# Appendix 1: Resumes

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### Education

- Bachelor of Arts, Architecture, University of Tennessee

### Certifications

- Certified LEED Accredited Professional, Building Design and Construction, United States Green Building Council
- Certified Construction Documents Technologist, Construction Specifications Institute
- Construction Specifications Certification

### Relevant Highlights

- Performed recovery efforts for six presidential disaster declarations including hurricanes, tornadoes, floods, and severe winter storms/snowfall
- Disaster recovery experience with Hurricanes Katrina and Sandy
- NYC Department of Parks and Recreation's Capital Division Team Lead
- Maximized eligible reimbursement for approximately 125 project worksheets, totaling \$850 million
- Experience with pre-construction estimation and management

## Professional Bio

Mr. Mark O'Mara is a highly skilled project manager and construction administration specialist, having worked on six presidentially declared disasters following hurricanes, tornadoes, severe winter storms, and flooding. Mr. O'Mara has been with Hagerty Consulting, Inc. (Hagerty) for six years. His design and construction experience encompass technical architectural consultancy, financial documentation reconciliation, and policy advising. Mr. O'Mara's experience includes the design and construction of multi-million-dollar buildings in the private sector, and he utilizes his expertise to help communities rebuild after disasters. He has been instrumental in the Federal Emergency Management Agency (FEMA) Public Assistance (PA) Program, holding more than five years of experience in examining projects, developing damage descriptions, cost estimates, advice on future actions, and appropriate funding documentation.

## Relevant Project Experience

### Project Manager | Hurricane Sandy Recovery | New York City

- Managed and oversaw a team of engineers, architects, analysts, and cost estimators in the data collection, development, and formulation of FEMA PA grants, capturing approximately \$1.1 billion of costs incurred by the New York City (NYC) Department of Parks and Recreation (DPR or Parks) as a direct result of Hurricane Sandy.
- Advised NYC on grants including: FEMA PA, 428 PA Alternative Procedures Pilot Program, 406 Hazard Mitigation, 404 Hazard Mitigation Grant Program (HMGP) and the Department of Housing and Urban Development (HUD) Community Development Block Grant Disaster Recovery (CDBG-DR) Program.
- Proactively developed procedures to ensure complete damage cost capturing (force account labor, contract, etc.), 406 Hazard Mitigation Proposals, project scope and procurement compliance, and project payment request grant draw downs. Completed detailed reconciliation of Hurricane Sandy expenditures for strict fiscal management.
- Directly increased the NYC's FEMA PA funding by more than \$450 million.

### FEMA PA Grants Development / Project Specialist | Hurricane Irene Recovery | New York City

- Assessed and oversaw over \$50 million in Project Worksheet (PW) grants.
- Advised large public institutions, jurisdictions, and municipalities of FEMA PA eligibility requirements. Developed damage descriptions, scopes of work, cost estimates, mitigation proposals, and construction schedules to advise FEMA on future actions and appropriation of funding.
- Performed detailed eligibility reviews of public sector applicant's financial documentation of disaster-related costs including force account payroll, invoices, purchase orders, quotes, proofs of payment, and contracts. Specialized in healthcare, private non-profits, and higher education facilities.

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### **FEMA PA Grants Development / Project Specialist | Alabama Severe Storms | Dewberry**

- Developed damage descriptions, scopes of work, cost estimates, mitigation proposals, and 50 percent rule calculations to advise FEMA on future actions and appropriation of funding.
- Developed innovative design and funding solutions to allow community tornado shelters to be funded through the FEMA PA 406 mitigation program and the 404 HMGP. Specialized in K-12 education facilities and tornado shelters.

### **FEMA PA Grants Development / Project Specialist | New York Severe Storms Recovery | State of New York**

- Developed damage descriptions, scopes of work, cost estimates, and mitigation proposals to advise FEMA on future actions and appropriation of funding.
- Worked closely with Environmental and Historical Preservation (EHP) teams to ensure project compliance and conformance to all applicable federal, state, and local laws.

### **FEMA PA Grants Development / Project Specialist | Illinois Snow Event | Dewberry**

- Developed damage descriptions, scopes of work, and cost estimates for Categories A and B projects.
- Successfully secured all documentation for substantiation for projects in Category A and B. Total obligation was more than \$6 million.

### **FEMA PA Grants Development / Project Specialist | Mississippi Hurricane Katrina**

- Assessed and oversaw over \$250 million in PW grants.
- Developed innovative methods of determining eligible reimbursement for Applicants with limited or completely missing documentation allowable under the Stafford Act and supplemental policy.
- Developed damage descriptions, scopes of work, cost estimates, mitigation proposals, and 50 percent rule calculations to advise FEMA on future actions and appropriation of funding.
- Advised large public institutions, jurisdictions, and municipalities of FEMA PA eligibility requirements. Specialized in K-12 education facilities.

## **Employment History**

**Hagerty Consulting, Inc.**, Recovery Sales Manager / Project Manager, 2013-Present

**Cannon Design**, Project Manager, 2008-2013

**Dewberry**, Architectural Consultant, 2005-2012

**Alliance Management Services**, Architectural Consultant, 2005-2006

# William “Brock” Long, CEM

Former FEMA Administrator



## Education

- Executive Leadership Program, US Naval Postgraduate School/Center for Homeland Defense and Security
- Master of Public Administration/Government Public Management (MPA), Appalachian State University
- Bachelor of Science in Criminal Justice, Appalachian State University

## Relevant Highlights

- Former Administrator of the Federal Emergency Management Agency
- Former Director of the Alabama Emergency Management Agency
- Alabama Incident Commander for the BP Deepwater Horizon Oil Rig Incident
- Received “Outstanding Achievement and Dedication to FEMA” awards, 2002-2004
- Former Alabama State Coordinating Officer for state declared disaster events
- FEMA National Integration Center, Evacuation Subject Matter Expert
- Certified Local Emergency Manager (Alabama)
- National Emergency Management Association Private Sector Committee Chairman, 2013-2015

## Professional Bio

Mr. William “Brock” Long, former Administrator of the Federal Emergency Management Agency (FEMA), has more than 18 years of experience assisting and supporting local, state, and federal governments to build robust emergency management and public health preparedness programs nationwide. He specializes in strategic planning, Homeland Security Exercise and Evaluation Program (HSEEP) exercises, evacuation, public safety, recovery management, and response logistics.

As the FEMA Administrator, Mr. Long served as the nation’s principal advisor to the President, responsible for coordinating the entire array of federal government resources down through 50 states, 573 tribal governments, and 16 island territories to assist with executing disaster preparedness, mitigation, response and recovery. Prior to this role, he served as the Director of Alabama’s Emergency Management Agency, where he acted as the State Coordinating Officer for 14 disasters, including eight Presidential, six state declared events, and two events of national significance. Concurrently, he served on the FEMA National Advisory Committee advising the sub-committee for response and recovery. During the nationally-significant BP Deepwater Horizon Oil Rig Incident, Mr. Long served as the on-scene Incident Commander for the Alabama Unified Command.

Mr. Long provides strategic direction and leadership to Hagerty’s full complement of emergency management programs and professionals. He offers subject matter expertise for select projects and contributes to the growing body of knowledge in the emergency management community. Mr. Long has also led over 50 projects across the nation ranging from active threat scenario exercises with universities to designing complex multi-jurisdictional all hazard evacuation plans for major Urban Area Security Initiative (UASI) designated jurisdictions.

## Relevant Project Experience

### Federal Emergency Management Agency – Administrator (2017-2019)

- Directed the US Fire Administration, The Center for Domestic Preparedness, Emergency Management Institute, and National Domestic Preparedness Consortium, responsible for establishing and improving competencies of officials within public safety at all levels of government charged with protecting against, responding to, and recovering from emergencies.
- Led 21,000 diverse and dedicated public servants and executed a multi-billion-dollar operating budget (\$15.9 billion annual appropriation/more than \$44 billion Disaster Relief Fund).
- Coordinated the federal government’s response to over 144 Presidentially declared disasters and 112 wildfires, including 3 of the nation’s most devastating hurricanes and 5 of the worst wildfires ever experienced.
- Spearheaded the inclusive design process and implementation of FEMA’s first “Whole Community” five-year strategic plan.

# William “Brock” Long, CEM

Former FEMA Administrator



- Rapidly transformed the agency’s business enterprise by implementing innovating Community Lifeline and FEMA Integration Team (FIT) concepts to strengthen private/public partnerships, and to permanently embed full time staff within state and tribal governments to better meet constituent needs.
- As the direct result of 12 influential Congressional testimonies, Congress passed the Disaster Recovery Reform Act that made Pre-Disaster Mitigation a national priority, provided meaningful changes to the FEMA workforce, and bolstered state and local emergency management capability.
- Executed the National Flood Insurance Program (\$1.3 trillion exposure/5 million policy holders) and implemented cutting-edge reinsurance capital market concepts that saved taxpayers approximately \$1 billion during Hurricane Harvey.

## **Project Executive | Continuity of Operations Plan (COOP) Training and Tabletop Exercise (TTX) Project | Wake County, North Carolina**

- Managed the development and conduction of three COOP training sessions and one executive level TTX using the County’s recently developed COOP.

## **Project Executive | Exercise Series | New England Regional Catastrophic Planning Initiative**

- Supported the planning and facilitation of 12 TTXs, Functional Exercises (FEs), and FSE drills with participants ranging from 15 to 75 people. These exercises focused on cybersecurity, logistics (including activation of state staging areas and commodity points of distribution), shelter operations, household pet shelter operations, and mass feeding operations.

## **Project Executive | Emergency Operations Center Functional Exercise (FE) | Centre Region Council of Governments and Penn State University**

- Oversaw the design and execution of an FE using a regional scenario designed to require mutual aid and multi-jurisdiction coordination and collaboration.

## **Director | Alabama Emergency Management Agency (AEMA) / Deputy Director | Alabama Department of Homeland Security**

- Appointed as the Governor’s Authorized Representative and State Coordinating Officer for eight Presidential, six state declared disaster events, including executing the state’s response to the H1N1 pandemic flu threat. Also served as the state’s lead Continuity of Operations Plans (COOP) advisor for pandemic flu events.

## **Statewide Emergency Planner/Hurricane Specialist | Office of the Governor | Georgia Emergency Management Agency**

- Supervised local emergency operations plans for 55 county governments in South Georgia and served as Georgia Emergency Management Agency (GEMA) responder for various disasters, states of emergency, and federal disaster declarations.

## **Employment History**

**Hagerty Consulting, Inc.**, Executive Chairman, 2019-Present

**Federal Emergency Management Agency**, Administrator, 2017-2019

**Hagerty Consulting, Inc.**, Executive Vice President, 2011-2017

**Alabama Emergency Management Agency**, Director, 2008-2011

**Beck Disaster Recovery, Inc.**, Southeast Regional Director, 2007-2008

**Federal Emergency Management Agency**, Hurricane Program Manager, 2001-2006

**Georgia Emergency Management Agency**, Statewide Planner/School Safety Coordinator, 1999-2001

### Education

- Master of Arts, Public Affairs, Humphrey Institute, University of Minnesota
- Bachelor of Arts, University of St. Thomas

### Relevant Highlights

- 30 years of experience in government finance, tax policy, and revenue estimation
- Eight years of experience in federal recovery grant programs, including CDBG-DR
- Extensive project management experience

## Professional Bio

Mr. John Grathwol has 30 years of experience in financial forecasting and management in the nation's largest City. He has managed teams of more than 70 analysts in the New York City (NYC) Office of Management and Budget (OMB) to analyze large segments of NYC's \$83 billion annual budget. During his tenure, Mr. Grathwol oversaw NYC's federal recovery grant programs after Hurricane Sandy, which included receiving more than \$9 billion from FEMA and more than \$4 billion from HUD. He has extensive experience with the FEMA Public Assistance (PA) and Hazard Mitigation Grant Programs (HMGP), and the US Department of Housing and Urban Development (HUD) Community Development Block Grant-Disaster Recovery (CDBG-DR) program. Mr. Grathwol also has extensive experience in policy impact analysis and public testimony before government bodies.

## Relevant Professional Experience

### Deputy Director, Budget Resources, Accounting Services, and Recovery Grant Management | NYC OMB

- Advised the Budget Director on the management of the City's \$83 billion annual operating budget. Contributed to the development of budget documents.
- Directed the development of the City's \$9.9 billion in FEMA grant claims for reimbursement of Superstorm Sandy-related damages across 54 City agencies. Managed the City's relationship with FEMA.
- Directed a team leading the financial management and compliance monitoring for \$4.2 billion in HUD-funded disaster recovery programs. Staffed and built OMB's CDBG-DR unit after the announcement of \$1.8 billion of CDBG-DR grant funds to the City. Led the publishing and approval of three Action Plans resulting in the obligation of \$2.1 billion of funding and \$861 million of reimbursements.
- Managed OMB's accounting services unit to resolve issues, including interfund borrowing.
- Prepared analyses of the budget impact of federal and state law changes.
- Testified on behalf of the administration at City Council hearings.

### Deputy Director, Budget Resources, Accounting and Workforce | New York City

- Advised the Budget Director on the management of the City's budget, directed the development of the City's FEMA grant claims, and managed the City's \$4 billion partnership with HUD.
- Managed the unit conducting cost analyses for collective bargaining with the City's more than 350,000 unionized workers.
- Directed unit analyzing required City contributions to its pension funds.
- Supervised team managing, budgeting, and forecasting the City's \$5 billion miscellaneous revenue budget.

# John Grathwol

## Subject Matter Expert



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### **Assistant Director, Tax Policy, Economic Forecasting Task Force | New York City**

- Led 14 analysts in preparation of the City's \$52 billion tax revenue budget. Advised the Budget Director on forecast risks, tax policy, and current economic issues.
- Developed policy recommendations and estimates of tax law changes. Evaluated the revenue impact of economic development proposals.
- Calculated the City's constitutional debt limit and operating limit. Defended the City tax forecasts before fiscal monitors, presented to investors, and testified at City Council hearings.

### **Deputy Assistant Director, Tax Policy, Economic Forecasting Task Force | NYC OMB**

- Directed 10 analysts in preparing the City's revenue budget. Developed policy responses and revenue estimates for policy changes.
- Served on the management team structuring debt and tax lien securitizations.

### **Unit Head, Tax Policy, Economic Forecasting Task Force | NYC OMB**

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

### **Supervising Analyst, Tax Policy, Economic Forecasting Task Force | NYC OMB**

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

### **Senior Tax Analyst, Tax Policy, Economic Forecasting Task Force | NYC OMB**

- Designed rates and performed forecasts for two personal income tax rate increases totaling over \$1 billion. Developed new model which accurately forecasts the impact of City, State and Federal tax law changes on the City's personal income tax. Accurately forecast the City's \$1.2 billion bank tax and \$1.8 billion unincorporated business tax.

## **Employment History**

**NYC OMB**, Deputy Director, Budget Resources, Accounting Services, and Recovery Grant Management, 2015-2019

**NYC OMB**, Deputy Director, Budget Resources, Accounting and Workforce, 2011-2015

**NYC OMB**, Assistant Director, Tax Policy, Economic Forecasting Task Force, 1999-2011

**NYC OMB**, Deputy Assistant Director, Tax Policy, Economic Forecasting Task Force, 1997-1999

**NYC OMB**, Unit Head, Tax Policy, Economic Forecasting Task Force, 1993-1997

**NYC OMB**, Supervising Analyst, Tax Policy, Economic Forecasting Task Force, 1991-1993

**NYC OMB**, Senior Tax Analyst, Tax Policy, Economic Forecasting Task Force, 1988-1991

**NYC Department of Parks and Recreation**, Budget Analyst, 1987-1988

**The Earl Craig Company**, Management Consultant, 1984-1987

### Education

- Senior Managers in Government Program, Harvard Kennedy School of Government
- Master of Public Administration, George Washington University
- Bachelor of Arts, Public Affairs, George Washington University

### Certifications

- Certified Economic Development Professional, National Development Council

### Relevant Highlights

- Seventeen years of highly successful experience managing disaster recovery and community
- Recipient of the Presidential Rank Award (Meritorious Level) for his service in the US Government
- Extensive experience working with the Department of Housing and Urban Development
- During projects, at times responsible for 140 staff members and more than \$90 billion of supplemental appropriations after disasters
- Directly involved in setting policy for Community Development Block Grant (CDBG) program

## Professional Bio

For nearly 30 years, Mr. Stanley Gimont has been at the center of the US Department of Housing and Urban Development (HUD) Community Development Block Grant program (CDBG). After beginning his career as a Presidential Management Intern at HUD, Mr. Gimont has dedicated his career to HUD and the CDBG program. He has served as Director or Deputy Director of several HUD programs, including the Section 108 Grant Program, the Entitlement Communities Program, CDBG-DR (-Disaster Recovery), and the Neighborhood Stabilization Program. He has been at the center of policy development and change at HUD, and has edited every CDBG-DR Federal Register Notice since 2008. He is also an experienced manager of personnel and funds: as Deputy Assistant Secretary, he was responsible for 140 staff members, \$4 billion of annual appropriations, and \$90 billion of supplemental appropriations following disasters.

## Relevant Professional Experience

### Deputy Assistant Secretary for Grant Programs | CDBG Grant Program Management HUD

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

### Director, Office of Block Grant Assistance | Block Grant Assistance Program HUD

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



# Stanley Gimont, MPA

## Subject Matter Expert

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### **Director, CDBG Entitlement Program | CDBG Entitlement Program HUD**

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

### **Deputy Director, Section 108 Loan Guarantee Program | Section 108 Loan Guarantee Program HUD**

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

## **Employment History**

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

**HUD**, Deputy Assistant Secretary for Grant Programs, 2016-2019

**HUD**, Director, Office of Block Grant Assistance, 2008-2016

**HUD**, Director, Entitlement CDBG Program, 2004-2006

**HUD**, Deputy Director, Section 108 Loan Guarantee Program, 2002-2004

**HUD**, Multifamily Housing Specialist, 2001-2002

**HUD**, Senior Financial Analyst, 1993-2001

**HUD**, CPD Specialist, 1989-1993

**HUD**, Presidential Management Intern, 1987-1989

### Education

- Bachelor of Science, Business Administration, James Madison University

### Relevant Highlights

- Certified Public Accountant (CPA)
- Finance lead for NYC's Hurricane Sandy Recovery
- Project Executive for the City of New Orleans Hurricane Katrina Recovery Operations
- Experience with FEMA's IA, PA, and CDL programs
- Project Manager in support of data management for the temporary housing mission at the LA TRO
- PAC during the 9/11 World Trade Center disaster recovery
- Federal financial management and auditing experience
- Significant experience with large-scale project management, practice development and leadership roles
- Experience working with governments of Ukraine and Russia on privatization and other issues
- Member of the American Institute of Certified Public Accountants (AICPA)
- QuickBase functionality expert

### Professional Bio

Mr. Anthony Trasatti, Certified Public Accountant (CPA), has more than 25 years of experience in accounting, auditing, and consulting experience at the national and international levels. He specializes in large-scale program management, operational analyses, and financial and eligibility audits. Mr. Trasatti has served in a variety of operational and advisory roles for client projects and is currently working on Hagerty

Consulting, Inc.'s (Hagerty's) New York City (NYC) Hurricane Sandy Recovery Project leading a team to assist the city in the ~\$14 billion recovery effort. In addition, Mr. Trasatti serves as the lead advisor on a team supporting the New York City Housing Authority (NYCHA) Program Management Services.

Prior to Hurricane Sandy recovery, Mr. Trasatti served as the Project Executive for an 18-person team providing financial and program management support to the City of New Orleans' disaster recovery program – comprised of Housing and Urban Development (HUD) appropriated Community Development Block Grant-Disaster Recovery (CDBG-DR) and Federal Emergency Management Agency (FEMA) Public Assistance (PA) grant funds. Earlier, Mr. Trasatti led a 25-person team for more than 38 months in providing program management support and technical assistance to FEMA's Louisiana Transitional Recovery

Office (LA TRO) in the administration of the largest direct housing operation ever conducted in the nation. He developed processes, systems, and structures that allow federal executives to gain direct insight into the housing mission, resulting in the ability to more efficiently address the concerns of the United States (US) Congress and establish additional accountability.

Before Hurricane Katrina, Mr. Trasatti served in a variety of client operational positions. He was Manager of the Data Analysis Unit for the Florida hurricanes in 2004 and the Federal Government's liaison to the New York/New Jersey Port Authority (PANYNJ) after 9/11.

### Relevant Professional Experience

#### Finance, Grants, and Information Lead | NYC Office of Management and Budget (OMB) Hurricane Sandy Recovery | Hagerty Consulting, Inc.

- Created a framework for integrating financial management system data into a web-based application across all agencies; initiated electronic on-line reporting of all agency Sandy-related expense and revenue modifications and agency expenditures; and introduced the FEMA Project Worksheets (PWs) into NYC's financial workflow to provide comprehensive reporting.
- Senior Financial Advisor, Program Management Services related to Hurricane Sandy Long-term Repair Program for the NYCHA.

### **Project Executive | City of New Orleans/LA TRO Hurricane Katrina Recovery | Hagerty Consulting, Inc.**

- Oversaw the technical, financial, and grants management support for the City of New Orleans' \$400 million CDBG program. The program was established after Hurricane Katrina to spur housing initiatives, economic development, and other community programs. Led a team that assisted the city to administer and monitor the individual project grants funded by CDBG. Specifically, the team established financial reports and analysis of CDBG funds including cash flows, budgets, projections, and reconciliation of funded amounts. Also, helped to establish program monitoring techniques and checklists of eligible activities for matters of compliance. Provided technical assistance to sub-recipients and sub-grantees regarding CDBG requirements and reporting practices. Assisted the City of New Orleans' Finance Department to track all financial transactions related to the city's Infrastructure Recovery Program following Hurricane Katrina. The team developed a web-based database solution that tracked over 200 capital recovery projects; 300 FEMA PWs (i.e., grant applications), totaling over \$200 million; and PW versions, version requests, expenditures, and reimbursements.
- Responsible for recommending funding strategies for each recovery project and providing cash flow models of the various funding sources. Processed vendor invoices; submitted reimbursement requests and versions; and routed contracts and contract amendments. Served as the principal point of contact supporting the Individual Assistance (IA) Program and direct housing mission at the LA TRO in New Orleans and lead program analyst responsible for creating reports and analysis to monitor and evaluate the activities of the IA direct housing program.
- Helped create a database management information system used to improve the quality of the data and to direct the workload of hundreds of FEMA personnel providing temporary housing units to applicants with urgent housing needs. Other activities included briefing senior management, interpreting IA data and projections of housing activity, creating new procedures to enhance program efficiencies, and acting as a key liaison to external parties.

### **Practice Leader for Grant Management Systems | Hagerty Consulting, Inc.**

- Knowledge and experience with existing information systems (National Emergency Management Information System (NIMS), FEMA Response and Recovery Applicant Tracking System (FRRATS), Working Integrated Process (WIP), Direct Assistance Replacement Assistance Considerations) and other tools (Geospatial Information System, InfoView).
- Instrumental in designing reports and enhancing existing systems, including updating FRRATS and developing the WIP, that have better enabled FEMA to manage its temporary housing programs. Helped manage the data needs of the direct housing operation following the 2004 Florida hurricanes. Led a team that conducted data analysis, prepared reports, and helped advise the Federal Recovery Office on strategic and operational issues related to direct housing. Performed financial reviews of loan cancellations submitted by applicants under the Community Disaster Loan (CDL) program. Conducted analysis and drafted reports allowing FEMA to make program decisions regarding the loan cancellation applications submitted by the City of Ada, MN, and the US Virgin Islands.

### **Public Assistance Coordinator (PAC) | 9/11 Terror Attacks | FEMA – PANYNJ**

- FEMA's PA program provided over \$8 billion in grants to state and local governments for response and recovery efforts related to the World Trade Center disaster of September 11, 2001.
- Served as PAC for the PANYNJ, one of the agency's largest applicants eligible for federal financial assistance.
- Primary representative within FEMA responsible for managing the distribution of federal financial assistance.
- Reviewed project reimbursements for quality control and project compliance.

### **Senior Manager | Price Waterhouse/PricewaterhouseCoopers**

- An experienced manager within the audit and business advisory services of the commercial practice and a lead manager of the transaction services group, offering specialized products and services to support the international investor community, including due diligence assignments and buy-side transactions.
- Focused on federal government audits, internal control reviews, compliance reviews, and auditable surveys.

# Anthony Trasatti, CPA

## Subject Matter Expert

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- Spent two years in the Russian Republic assisting the US Agency for International Development (USAID) to oversee and administer the mass privatization programs put in place during the 1990s.
- Spent five years in Ukraine assisting national companies and institutions seek foreign investments and convert to international accounting standards.

## Employment History

**Hagerty Consulting, Inc.**, Practice Leader, 2003-Present

**FEMA**, Public Assistance Coordinator (PAC), 2003-2004

**Price Waterhouse/PricewaterhouseCoopers**, Senior Manager, 1990-2002

# James “Jim” Smith

## Subject Matter Expert



### Education

- Business Management, Virginia Commonwealth University

### Certifications

- Chartered Property Casualty Underwriter (CPCU)
- Associate in Risk Management (ARM)
- Associate in National Flood Insurance (ANFI)
- License - Texas Risk Manager
- License – Texas Insurance Agent
- License – Texas Claims Adjuster
- License – New York Insurance Broker
- NFIP Claims Adjuster Certified
- Public Trust Clearance - Department of Homeland Security (DHS)

### Training

- National Flood Insurance Program (NFIP) Flood Adjuster Workshops
- National Incident Management System (NIMS)
- Introduction to Incident Command System (ICS)
- ICS for Single Resources and Initial Action Incidents
- FEMA Cost Estimating Format (CEF)
- FEMA’s Historic Preservation Program (NHPA)
- FEMA PA Operations I & II
- FEMA PAC Crew Leader Training

## Professional Bio

Mr. James (Jim) Smith is a highly qualified and credentialed subject matter expert on all Federal Emergency Management Agency (FEMA) Public Assistance (PA) policy issues. He has extensive disaster recovery experience including the World Trade Center attack; major hurricanes Katrina, Sandy, Rita, Ike, and Irene as well as smaller disasters, including the Louisa, Virginia, earthquake. He had over 25 disaster deployments during 16 years of FEMA PA experience, including assignments as Technical Services Task Force Leader, PA Policy Advisor, Public Assistance Coordinator (PAC), Insurance Group Lead, and Insurance Specialist as well as Project Specialist. He has an excellent command of the FEMA PA disaster regulations and policies with extensive experience in PA eligibility determinations. He has working knowledge of FEMA project formulations and cost estimating protocols as well as FEMA closeout practices.

Mr. Smith has relevant PA experience in difficult eligibility and cost issues. He assisted the City of Austin, Texas, with an \$11 million channel restoration project and their electrical distribution systems plus worked with Horry County, South Carolina, on their Severe Storms and Flooding beach erosion and restoration issues. He supported the New York City (NYC) Hurricane Sandy Recovery Project as a PA Policy Advisor and FEMA Insurance Advisor. Prior to his disaster recovery career, he was President and CEO of a national insurance and risk management advisory firm focused on local and state governments. There he led teams that provided strategic planning, process improvement, quality control, change management, and risk management for a variety of clients, including the states of Nevada and Texas and 15 different risk sharing pools across the United States (US).

## Relevant Project Experience

### Subject Matter Expert | NYC Hurricane Sandy Recovery | Hagerty Consulting, Inc.

- As one of the first four Hagerty staff deployed to the NYC project, assisted in development in overall recovery strategy planning and provided guidance on program eligibility issues as part of the policy team.
- Provided training to NYC recovery staff on FEMA PA and insurance.
- Assisted in securing FEMA insurance waivers for over \$5 billion in statutory insurance requirements by identification of unreasonable and excessive insurance requirements and worked with NYC Law Department to secure written insurance certifications from the New York Insurance Commissioner.
- Effectively saved NYC over \$25 million in annual insurance premiums that would have otherwise been required. Assisted securing FEMA \$1.6 billion in insurance exemptions on 14 categories of assets damaged in Sandy effectively saving over \$2 million in annual insurance premiums that would have otherwise been required.
- Assisted with proof of loss on a complicated layered property program with limits over \$400 million.

# James “Jim” Smith

## Subject Matter Expert



- Developed and secured agreement with FEMA on insurance apportionment protocols for over \$500 million in available insurance to maximize recovery from insurance and FEMA for insured FEMA eligible costs and insured ineligible costs such as business income.
- Developed a master flood insurance program for over 500 buildings and 600 vehicles/equipment. Saved NYC over \$20 million by discovery and resolution of FEMA errors in mandatory flood reductions from PA grants and audited the accuracy of an additional \$50 million in flood insurance reductions.
- Developed the cost reasonableness reports for the \$78 million insurance program to support the eligibility of the \$650 million Rapid Repairs program and \$125 million insurance program for the \$1.2 billion NYC Build-It-Back program.

### **Subject Matter Expert | City of Grand Prairie, Texas ,Severe Storms and Flooding Recovery**

- Attended meetings with FEMA and Texas Division of Emergency Management (TDEM) on behalf of the City, provided a high level operational overview of potentially eligible FEMA expenditures in PA Program Categories A-G, determined the City's current status, and analyzed where the City should spend their time and effort to maximize reimbursement potential with the available federal programs
- Identified potential Section 428 Alternative Procedures Pilot Program (PAAP) projects that would be beneficial to the City, tracked billable hours at a detailed level so that they could be classified as Direct Administrative Cost (DAC).

### **Project Manager | METRO of Harris County, Texas, Hurricane Ike and Texas Severe Storms Recovery**

- Provided expert advice to METRO management on FEMA PA eligibility issues. Managed and coordinated Project Worksheet (PW) development for damaged assets including buses.
- Secured an additional \$40,000 for an alternate project as result of resolving policy disagreement on costs basis. Secured and recovered \$91,000 in incorrect insurance deductions applied in Hurricane Ike. Provided training and development of METRO of Harris County personnel in aspects of PA program and preparedness training. Development of \$143,000 hazard mitigation project to offset Pilot Program under-runs in Hurricane Ike.

### **Project Manager | City of Austin, Texas, Severe Storms Recovery**

- Provided expert advice to City of Austin Homeland Security and Emergency Management (HSEM) management on FEMA PA eligibility issues to include recommendations and troubleshooting on PA program issues and policy interpretation on such issues as FEMA 50 Percent Rule, bridge work eligibility between emergency and permanent work, debris removal, emergency work including helicopters, and facility eligibility.
- Coordinated insurance recovery with FEMA assistance. Assisted with ensuring Austin was compliant with all federal and state regulations, rules, and policies related to disaster response, recovery, and program administration especially as it relates to applicable Code of Federal Regulations (i.e. 2 Code of Federal Regulations (CFR) § 200, 44 CFR § 200).
- Conducted site damage assessment visits in support of PW development planning. Secured approval of \$500,000 bridge replacement under FEMA 50 Percent Rule. Developed \$11 million channel stabilization PAAP project. Secured successful \$1.1 million policy decision on grass and sod for erosion control and additional \$3 million in cost estimates.

### **Subject Matter Expert | Horry County, South Carolina, Severe Storms and Flooding Recovery**

- Provided FEMA eligibility policy determinations on beach erosion for Horry County and technical assistance on road and bridge damages.
- Worked with Horry County and their political advisers and United States Army Corp of Engineers (USACE) consultant to receive accelerated federal funding for restoration on Horry beaches. Worked with FEMA and Horry to secure FEMA funding for beaches not funded by USACE.

# James “Jim” Smith

## Subject Matter Expert

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### **Senior Insurance Specialist | Various Disasters | FEMA Region III**

- FEMA insurance reviews to determine duplication of benefits from insurance and flood insurance in Special Flood Hazard Area (SFHA) locations. Determined Stafford Act Section 311 insurance requirements. Worked remote from home based office.
- Project assignment included insurance reviews from over 5,500 PWs from over 17 different disasters in Region III. Reviewed complicated layered property programs and over 2,100 insurance policies to determine available insurance coverage. Reviewed PW damage assessments and cost estimates to reconcile insured damages and uninsured damages.

### **Technical Services Management/Task Force Leader | Hurricane Ike Recovery | FEMA Field Office, Beaumont, Texas**

- Served as Technical Services Task Force Leader for the FEMA field office in Beaumont, TX, during Hurricane Ike that handled 15 counties in Southeast Texas.
- Responsible for supervision and oversight of technical services that supported PW development and coordinated five 50 Percent Rule determinations for projects in excess of \$25 million combined.

## **Employment History**

**Hagerty Consulting, Inc.**, Independent Consultant/ Subject Material Expert

**Federal Emergency Management Agency**, Public Assistance Officer/Insurance Specialist

**AECOM**, Technical Assistance Coordinator

**Tahoe Internet Corporation (d/b/a GovStar)**, Independent Consultant

**Johnson & Higgins/Marsh & McLennan**, Managing Director and President of AMGRIP, Inc

## Education

- Masters of Business Administration (cum laude), Trident University International
- Bachelor of Arts in Philosophy/Political Science, University of Alabama

## Certification

- FEMA Incident Action Planning Certificate
- FEMA Incident Command Structure (ICS) 400: Advanced ICS for Command and General Staff Certificate
- FEMA Incident Management I, II, and III Certificate
- FEMA Preliminary Damage Assessment (PDA) Certificate
- FEMA Emergency Support Function (ESF) #1-14 Certificates
- FEMA Public Assistance Specialist and Task Force Leader

## Relevant Highlights

- Managed seven Stafford Act disasters, two National Special Security Events (NSSE), and over 20 exercises over the course of 12 years
- Stood up a 36-county operation, overseer of all preliminary damage assessments (PDAs) for a \$45M flooding disaster
- Coordinated PA, IA, EHP and HMGP on multiple presidential disasters

## Professional Bio

Mr. Chris Thomas has over a decade of experience as a leader of large, complex projects. His emphasis is on implementing disaster and emergency plans and providing analyses of public assistance (PA) policy and supporting grants management. Mr. Thomas has connectivity to seven presidential declared disasters (hurricane, catastrophic flooding, tornado, and earthquake) and two National Special Security Events (NSSE). He's performed coordination of the Federal Emergency Management Agency (FEMA) PA, individual assistance (IA), environmental and historic preservation (EHP), hazard mitigation response, and recovery strategies as well as consolidation of infrastructure grants. As a FEMA PA Instructor, Mr. Thomas has educated local, state, and federal emergency managers in PA and Hazard Mitigation programs, including Stafford Act Sections 404, 406, and 428, as well as project worksheet (PW) formulation, insurance requirements and environmental and historic preservation restrictions. Prior to this work, as an officer in the United States (US) Air Force, Mr. Thomas oversaw the readiness and mobility of Air Force Personnel, stood up and manned an emergency operations center (EOC) in response to a hurricane, and led the logistics for the distribution of commodities (POD).

Mr. Thomas has worked extensively to support New York City (NYC) in response to Hurricane Sandy, both through Hagerty Consulting, Inc.'s contract with the Office of Management and Budget and through his time at FEMA. He has also supported recovery from the New York Severe Winter Storm and Snowstorm, Tennessee Severe Winter Storm and Flooding, and Colorado Severe Storms, Flooding, Landslides, and Mudslides.

## Relevant Project Experience

### Recovery Consultant | NYC Hurricane Sandy Recovery | Hagerty Consulting, Inc.

- Serves on the New York City (NYC) Hurricane Sandy recovery project, specializing in policy and grants management.

### Director of Operations | Disaster Recovery Operations | FEMA

- Developed strategy and objectives on a national scale. Built operational plans and organizational structures for DR-4085(NY); DR-4086 (NJ); and DR-4111(NY).
- Finance manager and overseer of federal grants worth over \$10 billion. Interpreted and implemented FEMA laws and regulations. Forged partnerships at local, state, regional and federal levels.
- Supervised administrative and technical personnel during major disasters (FEMA DR-4211(TN); DR-4205 (MS); DR-4145 (CO); DR-4193 (CA). Trained local, state, and federal employees in classroom and online settings on FEMA programs (PA Instructor).



# Chris Thomas

Subject Matter Expert



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## **Deputy Director of Infrastructure | Ebola Response | Centers for Disease Control**

- Served as Deputy Director of Infrastructure for the Centers for Disease Control and Prevention (CDC) Ebola Response.

## **Executive Director | Hurricane Sandy Recovery | Sandy Recovery Office**

- Advisor to the Executive Director, Sandy Recovery Office (SRO), New York, and director 200 PA personnel in the formulation and awarding of more than 4,500 PA grants.

## **Director of Infrastructure | Alabama Center for Disaster Preparedness**

- Led day-to-day operations, and participated in four major exercises simulating major flooding event, a hurricane, tornados, and a nuclear terrorist attack.

## **Operations Manager | Momentum Auto**

- Supervised technical and sales staff. Managed profit and loss, negotiated contracts, and instituted employee incentive plan.
- Led Information Technology transition.

## **Officer, Operations Division Chief, Education and Training Commander | United States Air Force**

- Managed, commanded, and evaluated staff of pilots, and technical and administrative service members.
- Engaged top-level politicians and military leaders. Wrote regulations, policy, tactics, and educational training materials.
- Served as Information Technology Division Chief as well as Readiness and Logistics Division Chief.

## **Employment History**

**Hagerty Consulting, Inc.**, Recovery Consultant, 2016-Present

**FEMA**, Director of Operations, numerous sites, 2013-2016

**Momentum Auto**, Operations Manager, 2012-2013

**US Air Force**, Officer, Operations Division Chief, Education and Training Commander, 2004-2012

### Education

- Master of Public Administration (MPA), Florida State University
- Bachelor of Arts, International Relations and Religious Studies, University of California, Davis
- International Migration Study Abroad Program, Freie Universität Berlin

### Certification

- Graduate Certification in Emergency Management and Homeland Security, Florida State University

### Relevant Highlights

- Extensive experience working in Florida
- Developed strategy to train over 2,600 PA, Mitigation, and EHP assets including FEMA and US Army Core of Engineers (USACE) staff for Hurricanes Florence, Michael, Harvey and Irma in coordination with senior leadership from the Emergency Management Institute, PA Cadre Management, and field leadership
- Served as Key Speaker at 2017 PA Workshop training 50+ states and territories on the New PA Delivery Model. Managed and lead a team of 70+ remote instructors to deliver FEMA Qualification System (FQS) PA Training, New PA Model mentoring support, and Grants Manager/Grants Portal subject matter expertise support nationwide
- Designed recovery portion of the 2015 Florida Statewide Hurricane Exercise Phase 3 full-scale exercise and Phase 4 tabletop exercise

## Professional Bio

Ms. Tanya Shannon is an emergency management professional with 10 years of experience. With expertise in the FEMA Public Assistance (PA) Program, she has improved the process of, and trained professionals in, the Section 428 Public Assistance Alternative Procedures (PAAP) Pilot Program and New Delivery Model throughout the US. Specifically, Mrs. Shannon developed curriculum and a training strategy for 1,200 PA, Mitigation, and Environmental and Historical Preservation (EHP) staff on Section 428 to support Puerto Rico's recovery from Hurricane Maria and 1,800 FEMA responders for Hurricane Harvey and Irma. She supported the setup of PA operations on 116 declared disasters nationwide from 2016-2018 coordinating training and strategic planning support for FEMA and State/Territory Field Leadership. She managed a team of 70+ PA instructors imbedded in field operations providing training and technical assistance to FEMA, Recipient and sub-recipient assets. Her success as FEMA PA Training Section Chief led her to serve in the high-profile speaking engagement as Key Speaker at the 2017 Public Assistance Workshop. In addition to her PA training expertise, she is skilled in immigration services project management. Mrs. Shannon served as the Director of both the Survivors of Human Trafficking and Immigration Legal Services Programs for the US Department of Health and Human Services (DHHS)-funded Opening Doors Inc. (ODI), where she developed the Emergency Operations Plan (EOP), conducted needs assessments, designed individual action plans, and represented clients before the Department of Homeland Security (DHS) and US Citizenship and Immigration Services (USCIS).

## Relevant Project Experience

### PA Training Section Chief | FEMA

- Oversaw the recruitment and hiring of 33 full time staff and 40 contract instructors. Supervised the development and implementation of a strategy to increase section to 57 individuals.
- Developed strategy to train over 800 PA, Mitigation, and EHP assets including FEMA, Rehired Annuitant Organization (RAO), and US Army Corps of Engineers (USACE) staff for Hurricanes Florence and Michael in coordination with senior leadership from Workforce Development Division (WDD), Center for Domestic Preparedness (CDP), Cadre Management, and field leadership.
- Developed curriculum and training strategy for Puerto Rico's Hurricane Maria recovery for 1,200 staff on the new Section 428 Public Assistance Alternative Procedures (PAAP) policy, Bipartisan Budget Act authorities, and sector-based approach. Developed training strategy and budget for the implementation of the Disaster Recovery Reform Act stipulations and authorities.

# Tanya Shannon

## Project Manager



- Served as Acting PA Cadre Coordinator, overseeing the management and deployment of the 1,900 PA Cadre for all newly declared disasters and Harvey, Irma and Maria (HIM) Hurricanes within this period. In addition, oversaw the kickoff of the hiring initiative within the Reservist Cadre and local hires to compensate for significant staffing shortages.

### **PA Training Team Lead | FEMA**

- Developed strategy to train more than 2,000 PA assets including FEMA staff, Technical Assistance Contract (TAC), and RAO USACE for Hurricanes Harvey, Irma, and Maria in coordination with senior leadership from WDD, EMI, Cadre Management, and field leadership; Supervised a remote team of over 45 instructors dedicated to the training mission requirements set by PA, Field Leadership, and Consolidated Resource Centers (CRCs). Developed mechanism to report assessments of individuals reporting to the JFOs to ensure New Model field leadership has visibility on the skills of staff reporting.
- Coordinated with Missouri, Texas, Florida, Georgia, South Carolina, and Louisiana field leadership to provide on-the-ground training support for New PA Model disasters.
- Served as Key Speaker at 2017 Public Assistance Workshop training 50+ states and territories on the New PA Delivery Model. Managed and led a team of 14 remote instructors to deliver FEMA Qualification System (FQS) PA Training, New PA Model mentoring support, and Grants Manager/Grants Portal Subject Matter Expert (SME) support nationwide. Managed the design and regular updating of the PA's seven 508 compliant FQS New Model courses.
- Developed the strategy and managed the implementation of the "New PA for Recipients and Applicants course," coordinating with regions and states to enact a force multiplying strategy to train States, Locals, Tribes, and Territories (SLTT) on the New PA Model, Grants Portal, and best practices.
- Developed the strategy and managing of the development of 28 independent studies for the SLTT audience. Developed and managed the Grants Manager/Grants Portal Hotline including the recruitment and training of hotline and budgetary requirements and recommendations for PA leadership in meeting blue sky and grey sky training requirements.
- Trained 1,400 individuals in 70 course offerings between October 2016 and June 2017. Managed the PA training operations at the Atlanta Reception, Staging, Onward Movement, Integration (RSOI) for Hurricane Matthew and at the Denton CRC managing a team of 12 individuals and training over 500 individuals in the PA New Delivery Model and old delivery model. Developed and implemented a training strategy to train regional staff on PA New Delivery Model incorporating Grants Manager and Grants Portal.

### **Assistant Reservist Program Manager | FEMA**

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

### **Program Coordinator | Center for Disaster Risk Policy (CDRP) at Florida State University**

- Designed recovery portion of the 2015 Florida Statewide Hurricane Exercise Phase 3 Full-Scale Exercise (FSE) and Phase 4 Tabletop Exercise (TTX). Collaborated with Florida Division of Emergency Management's (FLDEM) Bureau of Recovery, FEMA, and Emergency Support Functions (ESFs) with recovery responsibilities and facilitated delivery of federal disaster programs. Researched and analyzed pre and post disaster recovery planning best practices, presented these findings to the exercise design team, and incorporated findings into functional and TTX injects.

# Tanya Shannon

## Project Manager



- Provided technical assistance to support exercise personnel in methods to conduct Initial Damage Assessment numbers analysis. This prioritized Joint Preliminary Damage Assessment (PDA) efforts, better met the needs of the exercise scenario, and identified training requirements prior to the exercise. Designed, wrote, and facilitated functional exercise (FE) and TTX from information collected from Exercise Design Team (EDT) to meet goals set by ESFs, agencies, and 67 county jurisdictions.
- Introduced use of the online system, Go-To-Training, to facilitate the Phase 4 TTX to more effectively engage participating counties and over 20 state, federal, and non-governmental agencies. Managed the Simulation Cell (SimCell) including, recruitment, coordination, and training of volunteers. The TTX focused on the integration of Recovery Support Functions (RSFs) into state operations and planning, and exercising and/or developing Post Disaster Redevelopment Plans at the county level
- Developed classroom curriculum and taught a graduate-level course on emergency management exercise design, leadership and communication, hurricane policies, and business continuity plans (BCPs). Coordinated with the FLDEM's Bureau of Preparedness to offer the Advanced Professional Series (APS) courses, leading to the highest number of APS certification awarded in Florida history. Served as Unmanned Aircraft Liaison Officer during grey skies activation. Coordinated with air Operations and state small unmanned aircraft systems assets to improve post-disaster situational awareness.

## Employment History

**Hagerty Consulting, Inc.**, Recovery Senior Managing Associate, 2018-Present

**FEMA**, PA Training Section Chief, 2018; PA Training Team Lead, 2016-2018; Assistant Reservist Program Manager, 2016

**CDRP at FSU**, Program Coordinator, 2013-2015

**Government of India – IIPA**, Research Intern, 2013

**ODI**, Director, Survivors of Human Trafficking Program, 2008-2012; Director, Immigration Legal Services Program, 2010-2012; Intern Coordinator, 2008

### Education

- Fire Science Arson Investigator, Hillsborough Community College
- Associate of Arts, Communications, Indian River Community College, FL

### Certifications

- FEMA Independent Study Certifications
  - IS-100, 200, 700, 800, 00235, 15.A, 00241, 292, 0005.A, 07, 03, 00802, 00807, 00808, 00809, 00810, 00811
  - L823, L0603
- Proficient Computer Applications
  - MS Office
  - FEMA Grants Manager and Grants Portal
  - FEMA IQ
  - NEMIS
  - EMMIE
  - Adobe InDesign, Photoshop, Audition
  - Vocus PR
  - Inrix Traffic Mapping
  - Dreamweaver
  - NextGen
  - Razor's Edge

### Relevant Highlights

- Represented FEMA and the PA program to external stakeholders and partners
- Created integrated communications strategies to facilitate operations within FEMA and between FEMA and partner organizations
- Experience generating communications materials in a variety of formats
- Experienced media and Congressional point of contact

## Professional Bio

Ms. Amber S. Guy is an experienced disaster professional with a broad background in strategic communications, public relations, congressional affairs and Public Assistance (PA) for the Federal Emergency Management Agency (FEMA). As Executive Communications Officer for the FEMA PA program, Ms. Guy organized integrated communications strategies to coordinate and deliver core PA program functions. She was also responsible for working with senior leadership and subject matter experts to address complex information-sharing with external organizations and the public. She has extensive experience serving as a media and congressional point of contact.

## Relevant Professional Experience

### Executive Communications Officer, Public Assistance | FEMA

- Developed broad programs, special projects, and initiatives and was responsible for researching, planning, executing, and evaluating complex operations, programs, policies, and strategies.
- Developed integrated communication strategies and provided support critical to the execution and coordination of PA programs and activities.
- Provided project coordination as part of a team culture, performing a range of duties and responsibilities, including establishing goals and objectives and setting and adjusting short- and/or long-term plans and priorities.
- Collaborated with senior leadership and subject matter experts to effectively address complex operational and informational needs of external stakeholder organizations.
- Reviewed organizational strategic plans to assure alignment with the mission, vision, and values of the PA program. Expe
- Articulated and communicated projects, problems to be solved, actionable events, milestones, and program issues under review. Set achievable deadlines and timeframes for completion.
- Planned and organized major public assistance function, ensuring the activities complied with legal and regulatory requirements.
- Served as the media point of contact for PA in areas such as emerging technology and social media, community engagement, outreach, planning and execution of nationally prominent special events, visual information, communication research, planning and assessment and resource management.
- Represented FEMA and the PA program to a variety of governmental and non-governmental agencies, organizations, emergency management partners, volunteer organizations, councils, boards, working groups, private sectors, conferences, media organizations, and panels inside and outside the agency.
- Developed advanced planning strategies and coordinated dissemination of information related to man-made and natural disasters.

# Amber Guy

## Project Manager



- Established, developed, and maintained effective working relationships with staff, counterparts, and other senior officials; intergovernmental and nongovernmental leaders; federal elected and appointed officials; business, professional, and academic leaders; civic leaders; and the general public.

### **IMCORE Task Force Leader, Public Assistance | FEMA**

- Identified, analyzed, and applied relevant situational information and evaluated actions to complete assignments safely and meet identified objectives.
- Engaged in skills and capabilities assessments of staff to match with an applicant's recovery requirements.
- Facilitated resolution of issues to include Public Assistance eligibility recommendations, requests for information, and special considerations.
- Ensured accurate eligibility recommendations and quality deliverables from staff.
- Coached and mentored staff in improvement and development areas based on performance.

### **Public Affairs Specialist and Congressional Affairs Specialist | FEMA Office of External Affairs**

- Deployed to disasters around the country as a Public Affairs Specialist and/or Congressional Affairs Specialist.
- Developed, coordinated, disseminated and evaluated communications tactics and products intended to reach external audiences to include congressional, intergovernmental, private sector, media and the general public.
- Developed and advised on outreach strategies for external partners.
- Tracked FEMA policies, issues, and related correspondence to ensure changes were communicated the same way to all internal and external partners.
- Wrote and produced traditional communication products and web content including using VOCUS PR and Drupal to update FEMA.gov.
- Researched and developed a wide variety of informative materials for disaster survivors and congressional offices.
- Gathered and evaluated complex data and observed security procedures for preventing premature dissemination of materials.
- Developed social media outreach strategies for various subject matters.
- Established and maintained contacts with media representatives and national organizations and groups, responded to media and public inquiries, and supplied information to these audiences about FEMA programs and policies and developed contact with officials and other State and Federal governments.
- Planned and designed visual information materials such as tables, charts, illustrations, maps, photos, slides, and videos for print and electronic media.
- Responded to Congressional requests for information, coordinated staff briefings and worked with Congressional offices to answer concerns of their constituents.
- Developed staff briefing material and FEMA specific talking points for Congressional calls.

## **Employment History**

**Hagerty Consulting, Inc.**, Associate, 2019-Present

**FEMA**, Executive Communications Officer, Public Assistance, 2014-2019

**FEMA**, Public Affairs Specialist, 2005-2014

## Education

- Masters of Arts, International Affairs, Florida State University
- Bachelor of Science, Economics, Florida State University

## Certifications

- Certificate in FEMA Professional Development Series

## Relevant Highlights

- Extensive experience in Florida
- Experience with multiple recovery engagements in the aftermath of Hurricane Michael
- Skilled in the development and management of multiple Project Worksheets simultaneously
- Experience developing Continuity of Operations Plans and relevant facilitation of exercises

## Professional Bio

Ms. Kristin Samulkewitsch has more than eight years of experience in emergency management and disaster recovery programs within the State of Florida. Dating back to her time supporting the American Red Cross as a disaster action team member, her work has included supporting volunteer coordination, planning, and recovery associated with incidents ranging from local house fires to multi-jurisdictional tropical storms and hurricanes. Specific to recovery operations, Ms. Samulkewitsch has worked closely with jurisdictions to identify disaster-related damage, perform site assessments, and develop project worksheets (PWs). She has also worked closely with debris monitoring partners to ensure data is collected and adequately reconciled for federal reimbursement. Ms. Samulkewitsch started working at Hagerty this year. She excels in data management, reconciliation, and record keeping supporting grant management.

## Relevant Project Experience

### Recovery Managing Associate | Hagerty Consulting, Inc.

- Acts as Senior Financial Management Specialist for recovery operations for the City of Panama City Beach, FL and Bay District Schools, located in Panama City. These efforts include Federal Emergency Management Agency (FEMA) Grant Management, Benefit Cost Analyses (BCA), and Financial Management.

### Consultant | Landfall Strategies-Public Assistance

- Applied federal, state and county rules, regulations, policies, and procedures related to eligibility.
- Advised clients of their rights, responsibilities, and eligibility for program participation and provided clarity regarding rules, regulations, and policies.
- Reviewed and analyzed client financial information to determine eligibility for public assistance.
- Worked closely with debris monitoring department to ensure data collection was adequately reconciled for federal reimbursement.

### Consultant | Thompson Consulting Services-Public Assistance

- Worked with local, state and federal officials to identify disaster related damage.
- Performed damage site assessment visits to document storm damage.
- Assisted with the development of project scopes of work and reviewed for accuracy and eligibility.
- Reconciled and prepared project documentation in support of grant applicants.
- Managed simultaneous development of multiple PWs.
- Organized and maintained project records.

# Kristin Samulkewitsch

Project Role: Deputy Project Manager

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## **Research Analyst | Center for Disaster Risk Policy**

- Facilitated Tabletop Exercise System Technology (TEST) training at the Florida Division of Emergency Management (FDEM) and Florida State University.
- Conducted emergency management recovery research in the Northeastern United States (US) specific to the National Flood Insurance Program (NFIP) after Hurricane Sandy.
- Supported the Virtual Operations Support Team (VOST) in conjunction with the FDEM. Developed situational reports, monitored social media platforms, organized a cadre of digital volunteers.
- Served as a member of the Disaster Incident Research Team.
- Worked as internship liaison for the Emergency Management Certificate program for the Emergency Management and Homeland Security Program.
- Tested programs and exercise training technology.
- Developed Continuity of Operations Plan (COOP Plan).

## **Intern | Florida Department of Economic Opportunity (FDEO)**

- Assisted the Emergency Coordinating Officer for Emergency Support Function (ESF) #18 in the development of a COOP Plan.
- Developed web-based disaster relief documents and job aids specific to the Florida Small Business Emergency Bridge Loan Program.
- Coordinated disaster response and recovery efforts in the Joint Field Office after Tropical Storms Debby and Isaac.
- Trained FDEO employees in the Florida Department of Health Emergency Notification System (FDENS).

## **ESF #5 Intern | Florida Department of Emergency Management**

- Assisted the State Emergency Response Team Planning Section Chief, Brian Richardson.
- Created standard operating procedures and job aids for ESFs.
- Facilitated and participated in exercises (mass evacuation, state hurricane exercise, cyber security tabletop).
- Provided assistance to the victims of local disasters (i.e. house fires, tornadoes, etc.).
- Updated FDEM's COOP Plan.

## **Emergency Services Student Coordinator | American Red Cross – Capital Area Chapter**

- Coordinated all Emergency Services student teams.
- Recruited and ensured the training of all Emergency Services student volunteers.
- Designed, implemented, and coordinated outreach programs on Florida State University's campus and in the community.
- Gave preparedness presentations to community groups.
- Assisted the Director of Emergency Services by updating Red Cross plans and programs.
- Attended Emergency Management related meetings and conferences.

## **Disaster Action Team (DAT) Member | American Red Cross – Capital Area Chapter**

- Provided assistance to the victims of local disasters (i.e. house fires, tornadoes, etc.).
- Secured shelter, food, clothing, medical needs, and mental health counseling during deployments.



## Employment History

**Hagerty Consulting, Inc.**, Recovery Managing Associate, 2019-Present

**Landfall Strategies-Public Assistance**, Consultant, 2018

**Thompson Consulting Services – Public Assistance**, Consultant, 2017-2018

**Coniglio Group**, Manager, 2014-2017

**Aloft Hotels**, Operations Manager, 2013-2014

**Center for Disaster Risk Policy**, Research Analyst, 2011-2013

**Florida Department of Economic Opportunity**, Intern, 2012

**Florida Division of Emergency Management – Planning, ESF #5**, Intern, 2012

**American Red Cross**, Disaster Action Team Member; Emergency Services Student Coordinator, 2010-2011

# Kevin Fuller

## Project Role: Project Specialist (Recovery)



### Education

- Master of Public Administration, the Maxwell School, Syracuse University
- Bachelor of Arts in English and History, Williams College

### Relevant Highlights

- 15 years of public sector management consulting experience
- Active in disaster response/recovery and emergency management since 9/11
- Led Hagerty's Individual Assistance (IA), Public Assistance (PA), Hazard Mitigation, and Long-Term Recovery contracts
- Led the evaluation of the Disaster Housing Assistance Program following Hurricanes Katrina and Rita
- Prepared a post-disaster regional interim housing plan for the San Francisco Bay Area, and facilitated two plan validation workshops
- Designed an emergency response plan for ten-county San Francisco Bay Area that included over 100 jurisdictions
- Provided strategy and process consulting services to a variety of public sector clients including the US Department of Housing and Urban Development and Department of Homeland Security, State of California, and the Chicago Housing Authority

### Time Commitment

- 50 percent time commitment
- Other projects currently involved in:
- Montgomery County Imelda Debris Monitoring
- Horry County Hurricane Dorian Recovery Support
- Langan Roosevelt Island Operating Corporation Appeal Support

### Professional Bio

Mr. Kevin Fuller serves as Deputy Director of Recovery for Hagerty Consulting. He is a project manager and financial management professional with over eleven years of public sector experience. Mr. Fuller has extensive experience managing teams and Federal Emergency Management Agency (FEMA) disaster recovery operations for state and local clients, including Public Assistance (PA), 404 and 406 Hazard Mitigation programs, and data capturing. He also has provided support to various jurisdictions with technical assistance, including financial analysis, training, and appeal support.

At Hagerty, Mr. Fuller is currently serving as Project Manager, supporting clients in Maryland (Howard County) and South Carolina (Horry County, Town of Surfside Beach) to recover from disasters. His work includes providing financial analysis, policy expertise, and grant management advice. He supports the tracking, spending, drawdowns, and funding from all grant sources. Mr. Fuller is knowledgeable in FEMA PA and Hazard Mitigation Grant Program (HMGP). Additionally, he has supported clients in Texas after 2015 flooding (City of Austin, City of Grand Prairie, Williamson County) and Hurricane Harvey (Baptist Hospitals of Southeast Texas and St. Mark's Medical Center). Before focusing on the southern United States, Mr. Fuller provided project management support to New York City (NYC) during its \$14 billion recovery from Hurricane Sandy.

Prior to his work with Hagerty, Mr. Fuller worked as a Public Sector Financial Management Senior Consultant with IBM Global Business Services during Hurricane Katrina/Rita Relief Project – Parish Strike Team for FEMA. He successfully negotiated with landowners and parish officials to secure temporary housing sites for hurricane evacuees in two Louisiana parishes. Mr. Fuller also documented the status and location of hurricane evacuees among other reporting responsibilities. As an IBM consultant to the US Coast Guard, he worked on a finance transformation team successfully leading facilitated sessions with financial process owners to determine the gap between documented and actual processes. Mr. Fuller also developed work products that helped standardize future architecture development. For the US Navy, he analyzed, prioritized, and assisted in remediation of Navy enterprise-wide financial deficiencies as a Finance Transformation Analyst on the Department of Navy's Remediation Action Plan Project. Mr. Fuller has been with Hagerty for six years.

### Relevant Project Experience

#### Assistant Project Manager | Howard County, Maryland Disaster Recovery

- Led a consultant team focused on seeking reimbursement for disaster recovery related costs through the FEMA PA program related to flash flooding events in July 2016 and May 2018. The total estimated PA claim amount is currently \$28 million. While working closely with the Maryland Emergency Management Agency and FEMA, assisted the County in damage identification, project formulation, and grants management functions.

# Kevin Fuller

## Project Role: Project Specialist (Recovery)



- After the 2016 flooding, led efforts to formulate an appeal related to the eligibility of sidewalks along a federal-aid road. By reviewing historic documentation dating back to 1787, proved that the sidewalks were not part of the road's right of way, making them eligible for FEMA reimbursement.
- Trained County staff to make sure they were better prepared to respond effectively in the event of a future flooding event. The County put these lessons to practice during a more severe flash flooding event in May 2018, allowing them to better position themselves for a successful recovery.

### **Project Manager | Town of Surfside Beach, South Carolina Disaster Recovery**

- Led a consultant team focused on seeking reimbursement for damages to the Town's publicly owned fishing pier due to Hurricane Matthew in 2016. By leveraging FEMA's 428 Alternative Procedures program, increased the project value from an initial \$60,000 repair to nearly \$10 million for a full replacement pier with additional hazard mitigation. The pier project is the first time the 428 Program has ever been utilized combine full replacement with mitigation in the same project.

### **Project Manager | Horry County, South Carolina Disaster Recovery**

- Led a team of professionals in providing comprehensive disaster recovery and financial and grant management services to Horry County, which sustained approximately \$20 million in damages following a series of severe storms in October 2015 and Hurricane Matthew in 2016. Helped to identify all potentially eligible damages that may be claimable through insurance, FEMA's PA Program, or other funding sources.
- Aided in securing an expedited re-nourishment of Horry County beaches under the responsibility of the United States Army Corps of Engineers (USACE), which involved highlighting the damages and developing a strategy to secure funding involving coordination with USACE and congressional staff from South Carolina's Congressional and Senate Delegation.
- Worked directly with the South Carolina Emergency Management Division and FEMA to secure approval of accelerated depreciation of purchased equipment used in emergency beach berm construction due to being used in a saltwater environment, netting the County an additional \$160,000, compared to the \$0 FEMA initially approved.

### **Project Manager | City of Grand Prairie, Texas Recovery**

- Assisted the City of Grand Prairie, Texas to provide comprehensive disaster recovery and financial and grant management services related to Major Disaster Declaration FEMA-4223-DR-TX.
- Worked with the City to identify damages that may be claimable through insurance and/or the FEMA PA Program. To date, contributed to the development of \$5 million in PA project worksheets. Worked closely with the Texas Division of Emergency Management in appealing roughly \$1.5 million in costs related to USACE leases.
- Trained City staff to accurately and completely document emergency work costs, providing guidance and reviewed work products throughout. Identified additional \$1.9 million in eligible damages above initial FEMA estimates. Worked with city personnel to apply for and secure \$202,000 in 404 HMGP funding.

### **Project Manager | City of Austin, Texas Disaster Recovery**

- Led financial and grant management services related to Major Disaster Declaration FEMA-4223-DR-TX. Initiated recovery efforts, which included: attending meetings with FEMA and Texas Division of Emergency Management (TDEM), providing an overview of potentially eligible FEMA expenditures in PA Program Categories A-G, and identifying potential Section 428 Alternative Procedures Pilot Program projects that would be beneficial to the City.
- Assisted in getting a pedestrian bridge approved for full replacement, instead of simply repaired (50 percent rule), which netted an additional approximately \$200,000 for the City.

# Kevin Fuller

Project Role: Project Specialist (Recovery)



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## Project Management Team | NYC Hurricane Sandy Recovery

- Served as Data Manager on the NYC Hurricane Sandy recovery project management team utilizing on Hagerty's grant management platform. Worked to analyze data and manage the city's 404 Hazard Mitigation Grant Program (HMGP).
- Managed the processing of all PW approvals for city agencies, working closely with FEMA to ensure timely obligation of project. Identified and analyzed city-wide issues that could affect project reimbursement.

## Employment History

**Deputy Director of Recovery**, Hagerty Consulting, Inc., 2013-Present

**Senior Consultant – Public Sector Financial Management**, IBM Global Business Services, 2005-2011

### Education

- Master of Science in Biosecurity and Disaster Preparedness, Saint Louis University
- Bachelor of Arts in Psychology, William Jewell College

### Relevant Highlights

- Manage national portfolio of preparedness project, active in over 25 states.
- Authored high level emergency management policy at the Federal Emergency Management Headquarters
- Managing multi-year, multi-million-dollar initiative for CCTA preparedness

## Professional Bio

Mr. Kyle McPhee specializes in working with international, national, regional, state, local, and private-sector organizations in the areas of emergency management and preparedness. Since 2009, he has supported Hagerty Consulting as the Director of Preparedness Programs by managing initiatives across the county. He is an experienced emergency management professional with a history of working with communities and organizations to support preparedness efforts.

Mr. McPhee served as Project Manager for Hagerty's work pertaining to active threat scenarios in Cook County, Illinois. This multi-year, multi-million-dollar initiative supported the Chicago metropolitan area's efforts to better prepare for an active shooter, multi-assault, or rapid mass murder incident. As part of this project, Mr. McPhee oversaw the development of several complex, multi-jurisdictional Homeland Security Exercise and Evaluation (HSEEP)-based exercises.

Mr. McPhee has led numerous exercises and contributed to several areas of national-level doctrine. He was instrumental in the development of national-level documents, including guidance on how to facilitate planning within, and among, four FEMA regional offices (FEMA Regions IV, V, VI, and VII). Following this, Mr. McPhee deployed to the FEMA Region VII office to assist in the development of the joint state/federal operations plan. He was given a Distinguished Service Award by the FEMA Region VII Regional Administrator.

## Relevant Professional Experience

### **Process Improvement Analyst | FEMA National Integration Center (NIC) Collaborative Technical Assistance (TA) Evacuation Implementation | Booz Allen Hamilton**

- Provided evacuation technical assistance to state and local emergency managers.

### **Subject Matter Expert | Lee County Regional Evacuation Plan | Hagerty Consulting, Inc.**

- Developed an all-hazards regional evacuation framework for the Southwest Florida Region 6.

### **Project Manager | Westfield Property Management Corporate Tabletop Exercise | Westfield Corporation**

- Developed a tabletop exercise (TTX) and functional exercise (FE) series to build Westfield's capability to respond to active threat scenarios.

### **Director of Preparedness Programs | East-West Gateway Council of Governments | Hagerty Consulting, Inc.**

- Oversaw the construction of an alternate care site plan.

# Kyle McPhee

## Planning Specialist



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### **Project Manager | Cook County Department of Homeland Security and Emergency Management (DHSEM) Active Threat Program | Hagerty Consulting, Inc.**

- Led curriculum development and training of first responders in responding to situations where lone or multiple gunmen are undertaking, or threatening to undertake, violence against individuals.

### **Preparedness Consultant | National Emergency Management Association Mission Ready Packages | Hagerty Consulting, Inc.**

- Consulted on the development, facilitation, and evaluation of a Mission Ready Packages (MRP) TTX for the National Emergency Management Association (NEMA)/Association of State and Territorial Health Officials. Served as the deputy project manager for NEMA to develop public health and medical MRPs. Led the development of national level guidance on the use of the Emergency Management Assistance Compact (EMAC) as it relates to health and medical response.

### **Access and Functional Needs Planner | Regional Catastrophic Planning Teams | Various States**

- Supported a tri-state mass care planning project through Regional Catastrophic Planning Team (RCPT) including the states of Rhode Island, New Hampshire, and Massachusetts. Specifically focused on Functional Needs Support Services (FNSS).
- Served as project manager for tri-state planning effort accounting for shelter placement and evacuee tracking from a regional hub concept of operations for the IN-IL-WI RCPT. Facilitated stakeholder outreach to targeted communities with disabilities.
- Authored regional hub reception center planning guide for the greater Chicago metropolitan area and facilitated regional working groups on plan development issues for the IN-IL-WI RCPT.

### **Planner | Fort Worth Emergency Operations Plan Update | Hagerty Consulting, Inc.**

- Led team of assessors to critique the level of FNSS compliance within 10 shelter sites throughout the City of Fort Worth, Texas.

### **Project Manager | Long Beach Epidemiological Investigation | Hagerty Consulting, Inc.**

- Managed the design, facilitation, and evaluation of a regional detection and investigation TTX for the City of Long Beach, California.

### **Manager, Global Crisis Response | Heart to Heart International**

- Direct responsibility for all aspects of emergency preparedness, response, and recovery for one of Forbes magazine's top 200 international humanitarian organizations, active in over 110 counties worldwide. Coordinated the distribution of nearly \$1 million of medical aid worldwide.

### **Coordinator, Safety and Emergency Preparedness | Saint Luke's Hospital-Plaza**

- Direct responsibility for all aspects of emergency preparedness for a 630-bed acute care facility. Coordinated all institutional emergency operations planning and response, including training for over 4,000 employees. Provided direct instruction on ICS 100, 200, 300, 400, 700, and 800.b. Facilitated hazardous materials operation's team development, safety, and training.

## Employment History

**Hagerty Consulting, Inc.**, Director of Preparedness Programs, 2009-Present

**Heart to Heart International**, Manager, Global Crisis Response, 2009

**Saint Luke's Health System**, Coordinator, Safety and Emergency Preparedness, 2007-2009

**Pleasant Valley Fire Department**, Firefighter/ Emergency Medical Technician, 2006-2009

**Mid-America Regional Council, Planner**, Emergency Services and Homeland Security, 2006-2007

## Education

- Master of Science, Community and Regional Planning, University of Texas at Austin
- Bachelor of Arts, Interdisciplinary Studies, Virginia Tech University

## Relevant Highlights

- Developed regional catastrophic mass care planning elements for a 8.5 million resident area in New England
- Led pre-disaster recovery planning in New Hampshire and Chatham County, Georgia
- Served as Philadelphia EOC Manager and Liaison Officer on city-wide operations including hazardous material incidents
- Chief author, July Fourth Incident Action Plan for City of Philadelphia
- Coordinated oversight and implementation of all Philadelphia emergency plans, including the City's HazMat Plan
- Managed and developed Boston's Shelter Feeding and Household Pet Support Annexes
- Coordinated with the National Transportation Safety Board following the 2010 "Duck Boat" accident on the Delaware River
- Locally directed FEMA DRC's following 2011 Hurricane Irene/Tropical Storm Lee

## Professional Bio

Ms. April Geruso brings over 13 years of experience as an emergency manager and planner. She is adept at helping communities prepare for recovery from catastrophic events, as well as experienced in leading and supporting after-action reviews and recovery efforts following events.

With Hagerty, Ms. Geruso has led the oversight process for numerous projects around the country. She is highly knowledgeable of the New England Region and recently assisted the Massachusetts Emergency Management Agency (MEMA) with a Mass Care Operational Plan Project and has helped them develop the Concept of Operations (ConOps) for their Regional Reception Centers and State-initiated Regional Shelters. Ms. Geruso was also integral in helping New York City (NYC) and its agencies to strategically plan for effective coordination and management of disaster cost recovery under Federal Disaster Programs related to Hurricane Sandy. In addition, she managed the development and resource assessment of the City of Boston Office of Emergency Management's (OEM's) Shelter Feeding Support Annex and Household Pet Support Annex as an operational guide to facilitate a multi-agency response for feeding assistance in advance of, during, and after a disaster.

Mr. Geruso is also skilled in helping communities to develop long-term recovery strategies. She worked with the New England Regional Catastrophic Preparedness Initiative (NERCPI) and led the efforts to revise the Long-Term Recovery Annex for the State of New Hampshire. She also supported Chatham County, GA with their Long-Term Recovery Plan and led efforts to develop Brantley County, GA's Disaster Recovery and Redevelopment Plan. Ms. Geruso has also managed Hagerty's services providing pre/post disaster administration and management to the METRO of Harris County, TX.

Ms. Geruso's strength as a planner is further evident in her work for the City of Philadelphia in the Managing Director's Office of Office of Emergency Management (MDO-OEM). As Deputy Director for Planning at MDO-OEM, Ms. Geruso provided oversight and coordination for all emergency plans developed within MDO-OEM, from the city's evacuation plan to energy assurance, weapons of mass destruction (WMD), mass fatality, and long-term recovery. Ms. Geruso developed citywide Incident Action Plans (IAPs) and regularly conducted inter-agency after-action meetings (AAMs) and after-action reports (AARs) following emergencies.

Lastly, Ms. Geruso has responded to disasters, including coordinating with the National Transportation Safety Board (NTSB) following the 2010 "Duck Boat" accident on the Delaware River and locally directing the Federal Emergency Management Agency's (FEMA's) Disaster Recovery Center (DRC) in Philadelphia following Hurricane Irene and Tropical Storm Lee in 2011.

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### Relevant Project Experience

#### **Program Coordinator | Georgia Department of Natural Resources (DNR) Seven County Project Strengthen the Disaster Resiliency of GA's Coastal Region | Hagerty Consulting, Inc.**

- Updated statewide guidance document for developing local Disaster Recovery and Redevelopment Plans (DRRPs).
- Transferred lessons learned from previous local government DRRP's including gaps and needs, and steps to address them.
- Developed Disaster Recovery and Redevelopment Plans, through a stakeholder participation process, for Camden, Charlton, Wayne, Long, Liberty, Bryan, and Effingham counties in coastal Georgia.
- Disseminated DRRP planning processes and results through a public forum in which stakeholders can exchange information regarding hazard resiliency.

#### **Project Manager | Mass Care Operational Plan Project | Massachusetts Emergency Management Agency (MEMA) | Hagerty Consulting, Inc.**

- Developed Best Practices Document in areas of mass care facility planning and coordination.
- Facilitated series of stakeholder meetings through tactical planning meetings to determine points of consensus for operational structure.
- Drafted ConOps for Regional Reception Centers, State-initiated Regional Shelters, and Mass Care Mission Group Concepts.
- Developed resource projection tools and facility assessment checklists.

#### **Subject Matter Expert | FEMA National Incident Management System (NIMS) Resource Typing Support Services | Hagerty Consulting, Inc.**

- Provided expertise in supporting the implementation of the National Preparedness System (NPS) and NIMS through the rollout of the updated NIMS doctrine.
- Developed new NIMS resource typing, job titles and qualifications, and associated guidance documents and the development of National Qualification System (NQS).

#### **Recovery Manager | City of Austin Harvey State of Texas Assistance Request Support | Hagerty Consulting, Inc.**

- Developed shelter operations expense tool for use by city agencies related to Hurricane Harvey support.
- Developed self-guided training for city agency employees to effectively complete and return expense tool.

#### **Preparedness Program Lead | NYC | Hagerty Consulting, Inc.**

- Led project team in developing organizational and planning support for New York City's (NYC's) shelter plan.
- Co-authored city's surge staffing plan.
- Assisted the city and its agencies to strategically plan for effective coordination and management of disaster cost recovery under Federal Disaster Programs related to Hurricane Sandy.

#### **Program Manager | Alamo Area Council of Governments Active Threat Table Top Exercise (TTX) / Improvement Plan (IP) | Hagerty Consulting, Inc.**

- Facilitated TTX for Alamo Area multi-disciplinary stakeholder group related to a complex, coordinated terrorist attack (CCTA) affecting the region.
- Facilitated TTX for executive leadership regarding top-level responsibilities and gaps pertaining to a CCTA in the region.
- Oversaw development Homeland Security Exercise and Evaluation Program (HSEEP) / Texas Division of Emergency Management (TDEM) compliant AARS / IPs for both exercises.



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**Project Manager | Delaware County, Pennsylvania Mass Care Annex | Hagerty Consulting, Inc.**

- Led efforts to identify best practices in mass care and drafted Mass Care Annex and supporting tools specific to the county.

**Project Manager | Bucks County, Pennsylvania Mass Care Annex | Hagerty Consulting, Inc.**

- Led efforts to identify best practices in mass care and drafted Mass Care Annex and supporting tools specific to the county.

**Project Manager | Capital Area Council of Government (CAPCOG) AAR / IP | Hagerty Consulting, Inc.**

- Facilitated two AAMs for a three-day chemical, biological, radiological, nuclear, and explosive (CBRNE) / hazardous materials (HazMat) exercise series occurring in the CAPCOG region of Texas with the over 30 participating agencies.
- Developed HSEEP and TDEM compliant AARs / IPs for each of the three days of the exercise with a strategic focus on identifying areas of consideration for inclusion into the next exercise of similar scope in the region.

**Planning Support | FEMA National Integration Center (NIC) Planning Technical Assistance (TA) Project | Hagerty Consulting, Inc.**

- Drafted jurisdiction evacuation plan to be utilized as national pilot plan and regional evacuation coordination supplement.
- Designed tools for nontraditional stakeholder engagement for purposes of evacuation planning.
- Facilitated region-wide evacuation planning workshop.

**Planning Support | Tarrant County, Texas, Public Health (TCPH) Exercise | Hagerty Consulting, Inc.**

- Led development of an Incident Command System (ICS)-focused TTX to introduce TCPH's revised internal ICS response structure to county public health emergency response staff.
- Co-facilitated the TTX to approximately 60 county emergency response staff.
- Led the AAR and IP process with the planning team, identifying areas of focus for the next year's priorities.

**Project Manager | Chelsea Public Schools, Massachusetts, Emergency Operations Plan (EOP) Planning and Training | Hagerty Consulting, Inc.**

- Managed development of emergency readiness and emergency planning materials for Chelsea Public Schools in Massachusetts, including a Readiness and Emergency Planning Guide, comprised of four main elements: checklists and emergency kits for faculty, and checklists and kits for principals.
- Facilitated a workshop to familiarize Chelsea Public Schools administrators with the materials, as well as school safety and school preparedness best practices.
- Developed a training workshop to familiarize administrators with the newly completed document, to train administrators how to teach school faculty and staff on all preparedness planning components, and to equip the other schools with the tools to develop their own EOP.

**Project Manager | CenterPoint Energy Storm Restoration Manual and Exercises | Hagerty Consulting, Inc.**

- Managed the evaluation and restructuring of the company's service restoration process, beginning with a full rewrite of the company's antiquated Storm Restoration Plan and the creation of an ICS response structure within Distribution Power Delivery.

**Project Manager | New Hampshire Long-Term Recovery Planning | Hagerty Consulting, Inc.**

- Led efforts to revise the long-term recovery annex for the State of New Hampshire.

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**Lead Planner | Brantley County, GA Disaster Recovery and Redevelopment Plan | Hagerty Consulting, Inc.**

- Organized team efforts through a five-phased approach aligning the NDRF and the State of Georgia with local applications for Brantley County.
- Identified short-term and long-term recovery priorities in plan development.

**Project Manager | Metro-Boston Homeland Security Region (MBHSR) Evacuation Planning Project | Hagerty Consulting, Inc.**

- Managed evacuation project, including nine individual Evacuation Annexes and Standard Operating Guides (SOG), and one Regional Coordination Plan. Deliverables included an evacuation-specific resource analysis and a resource projection-planning tool.

**Preparedness Lead | METRO of Harris County, Texas, Pre/Post Disaster Admin & Management | Hagerty Consulting, Inc.**

- Managed Hagerty's services for pre/post disaster administration and management services for the METRO.
- Facilitated cost recovery workshop for key METRO staff, identifying operational gaps, and developing next steps document intended to reduce gaps.
- Served as Emergency Operations Center Manager and as Liaison Officer for numerous city-wide and localized operations, including hazardous material incidents.
- Developed or contributed to AARs for all activations, regardless of scale.
- Restructured reporting procedures for Tier II (SARA Title III) hazardous material facilities, coordinating daily with the city's vendor and Commonwealth of Pennsylvania counterparts.
- Locally directed FEMA DRC following 2011 Hurricane Irene/Tropical Storm Lee.

**Human Services Planning Coordinator | City-Wide EOPs | City of Philadelphia Managing Director's Office**

- Authored city-wide EOPs, including Mass Care and Shelter, Human Services Recovery, and Repatriation plans.
- Deployed to numerous city-wide and localized incidents to facilitate communication and coordination between response agencies as well as activate and manage multiple shelters.

**Associate Urban Planner and Project Manager | East Riverside Corridor Master Plan | A. Nelessen Associates, Inc.**

- Managed East Riverside Corridor Master Plan project in Austin, Texas by facilitating consensus-building public meetings and analyzing public response data for numerous urban planning projects for A. Nelessen Associates, Inc.

## Employment History

**Hagerty Consulting, Inc.**, Management Consultant, 2012-Present

**City of Philadelphia Office of Emergency Management**, Deputy Director for Planning, 2011-2012

**City of Philadelphia Office of Emergency Management**, Human Services Planning Coordinator, 2009-2011

**A. Nelessen Associates**, Associate Planner & Project Manager, 2007-2009

**Taylor Design Group**, Junior Planner, 2006-2007

**Foundation Communities**, Development Specialist for Supportive Housing, 2006

**PeopleFund**, Economic Summit Specialist, 2005

## Education

- Masters of Public Administration- Florida State University
- Emergency Management and Homeland Security Program Graduate- Florida State University
- Bachelor of Arts in English-Florida State University

## Relevant Highlights

- FEMA Master Exercise Practitioner, 2018
- L-146, Homeland Security Exercise and Evaluation Program (HSEEP) Certification
- IS-100, 200, 700, 800 Course Completion
- FEMA COOP Excellence Series - Professional Continuity Practitioner
- FEMA Advanced Professional Series
- FEMA Professional Development Series
- Diverse nation-wide emergency management project leadership

## Professional Bio

Ms. Ashley Wargo is an emergency manager with experience working with clients at the state and local levels in planning, exercise development, resource management, and multi-agency/jurisdictional coordination. She has natural skill for coordinating complex multi-stakeholder projects with Hagerty that include National Emergency Management Association (NEMA) mission ready packages (MRPs), tabletop (TTX) and full-scale exercises (FSEs), after action reporting, critical infrastructure interdependencies and planning, and compliance.

She has completed the Federal Emergency Management Agency (FEMA) Master Exercise Practitioner (MEP) Program and applies this as a knowledgeable exercise developer and facilitator and has helped clients all over the country to prepare for emergencies through testing and assessing their capabilities. Her more recent experiences include developing template exercise materials testing states' ability to respond and recover from a long-term, widespread power outage caused by a cyberattack on the electrical grid, as well as working with states across the country to develop and organize resources in various disciplines to be deployed through mutual aid following a disaster.

As a State Regional Domestic Security Task Force (RDSTF) Planner at the Florida Division of Emergency Management, she led the development of Florida's 2014 Threat and Hazard Identification and Risk Assessments (THIRA) for submittal to the Department of Homeland Security. She also served as the Plans Chief in the 2015 FEMA-evaluated Hostile Action Based Exercise at Turkey Point Nuclear Power Plant and coordinated the revision of Florida's Radiological Emergency Preparedness (REP) Plan and all site-specific annexes including Kings Bay Nuclear Submarine Base, Kennedy Space Center, and Florida's two active nuclear power plants, Turkey Point and St. Lucie, and for the decommissioning of Crystal River.

Ms. Wargo has a proven track record of project and personnel management, process and system innovation, and a passion for furthering and developing the field of emergency management.

## Relevant Project Experience

### Project Manager | California Office of Emergency Services ESF 18 Cybersecurity Annex Development and TTX

- Developed of a statewide cybersecurity annex to the state's emergency plan.
- Coordinated a stakeholder engagement strategy to include private sector, public sector, critical infrastructure, and government stakeholders from across the state.

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### **Planner and Conference Support | NEMA Emergency Management Assistance Compact (EMAC) Response to 2017 Hurricane Season After Action Report (AAR)**

- Planned and facilitated an after action process to collect lessons learned and success from Requesting States, Assisting States, deployed personnel, and other applicable stakeholders in reference to the EMAC deployments during Harvey, Irma, and Maria.
- Developed and disseminated surveys to the various responding EMAC parties including deployed personnel, receiving entities, Requesting and Assisting states, and EMAC leadership, among others.
- Assisted in the facilitation of the multi-day after action conference which included representation from multiple disciplines from all across the country.

### **Deputy Project Manager / Lead Planner | Austin-Travis County Hurricane Harvey Response AAR**

- Planned and facilitated thirteen focus area stakeholder meetings with over 200 attendees to collect information about Austin-Travis County's response to Hurricane Harvey.
- Developed and disseminated a regional survey to collect response experiences from agency partners, while concurrently developing and disseminating a survey to the public to collect information about how to better serve the community during an emergency.
- Planned and facilitated an after-action conference and corrective action plan meeting, synthesizing the goals and feedback of both city and county departments into a single actionable report and plan.
- The final outcomes of this process were a county-wide, cohesive AAR and improvement plan (IP).

### **Exercise Lead | Roe Family Emergency Operations Plan (EOP) Development and Tabletop Exercises (TTXs)**

- Collaborated on the revision of two facility EOP to meet Centers for Medicare and Medicaid Services (CMS) requirements for nursing home facilities.
- Facilitated two TTXs with the facilities to validate the recently updated EOPs.

### **Deputy Project Manager/Emergency Management Planner | NEMA EMAC Public Health MRP Development and Tabletop Exercise**

- Provided services as an Emergency Management Planner for NEMA EMAC Public Health MRP project, creating relationships between various stakeholder groups with the ultimate goal of bolstering each pilot's states capabilities to organize and deploy resources.
- Coordinated and planned workshops for five pilot states to educate public health stakeholders about EMAC and MRPs.
- Provided hands-on technical support in the building of approximately 30 public health and medical MRPs across the 5 states.
- Planned and facilitated two EMAC MRP-focused TTXs for two of the pilot states.
- Developed TTX planning materials to serve as templates for the development of future EMAC MRP-focused TTXs.

### **Emergency Management Planner/Exercise Coordinator | SAOEM Complex Coordinated Terrorist Attack (CCTA) TTX**

- Supported the development and facilitation of multi-jurisdictional CCTA tabletop exercise for approximately 100 stakeholders.
- Supported the development and validation of a multi-jurisdictional and multi-agency TDEM and HSEEP-compliant after action report and improvement plan.

# Ashley Wargo, MEP

Exercise Specialist



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## **Emergency Management Planner/Exercise Coordinator | CenterPoint Energy Storm Restoration Plan Revision, Job Aid Development, Trainings, and Tabletop Exercises**

- Collaborated on the reevaluation and restructuring of CenterPoint Energy's Storm Restoration Plan, the CenterPoint Energy Distribution Power Delivery emergency response plan. Identified internal promising practices and national best practices for incorporation into the revised plan.
- Established response phases within CenterPoint Energy to enable a focused, cohesive company response. Developed an internal response structure for CenterPoint Energy, including the establishment of roles, teams, job aids, and assistance with the institutionalization of rotation schedules.
- Planned and facilitated five trainings and TTXs for CenterPoint Energy response personnel to introduce, exercise, and validate the revised plan and new concepts.

## **Exercise Coordinator | Tarrant County Public Health Incident Command Tabletop Exercise**

- Lead development of an incident command system (ICS) focused TTX to introduce Tarrant County Public Health (TCPH)'s revised internal ICS response structure to county public health emergency response staff.
- Co-facilitated the TTX to approximately 60 county emergency response staff.
- Lead the AAR and improvement planning IP process with the planning team, identifying areas of focus for the next year's priorities.

## **Emergency Management Planner | Prince William County Full-Scale Shelter Exercise**

- Assisted in the design and execution of a full-scale exercise to test Prince William County's Shelter Operations Plan that included over 200 participants.

## **Exercise Support | Cook County Department of Homeland Security and Emergency Management Agora Rose Full-Scale Exercise**

- Provided day-of exercise support as a Deputy Lead Controller for one of the four components of a multi-assault active shooter full-scale exercise.
- Assisted in the coordination of exercise play and participant organization.

## **Employment History**

**Hagerty Consulting, Inc.**, Project Manager/Lead Exercise Planner, 2015-Present

**Florida Division of Emergency Management**, State Regional Domestic Security Task Force Planner, 2014-2015

### Education

- Master of Public Policy, Duke University
- Bachelor of Science in Biology and Society, Cornell University

### Certifications

- Federal Emergency Management Agency (FEMA) Independent Study courses: 100, 200, 700, and 800
- Homeland Security Exercise and Evaluation Program (HSEEP) certified

### Relevant Highlights

- Developed strategic plans for King County and the City of San Francisco
- Led over 30 regional planning initiatives for UASIs throughout the nations
- Managed, created, and conducted over 60 exercises using HSEEP
- Supported the development of San Diego's earthquake annex and recovery plan
- Assisted in the creation of a smart phone application that allows general public to notify Public Works of infrastructure damage following emergencies
- Managed the Occupant Emergency Program project for Social Security Administration
- Developed Amtrak's Corporate Emergency Plan and Crisis Communication Plan
- Led teams to develop over 50 COOP plans for federal, state, and local government agencies
- Facilitated over 25 COOP training and exercises

## Professional Bio

Ms. Gisele Parry is an emergency manager with more than 18 years of experience supporting clients across the United States (US). Ms. Parry provides expert-level technical, analytical, managerial, and logistical support to a wide range of emergency management and homeland security projects. Her primary areas of expertise include continuity of operations (COOP)/continuity of government (COG) planning, emergency response and operations planning, strategic planning, critical infrastructure protection, hazardous material and oil spill response and training, and exercise development and evaluation. Ms. Parry has served as the project manager for numerous regional catastrophic planning projects. She draws upon her wealth of experience in large-scale planning projects involving facilitation of stakeholder input in urban areas, including King County, Washington; the City/County of San Francisco, California; City of Chicago, Illinois; and the Atlanta, Georgia region.

She has been a lead writer and/or project manager for over 80 different planning projects and developed, conducted, and/or evaluated dozens of disaster preparedness and management projects.

Ms. Parry was also a lead author for the Super Bowl XLV After Action Reports (AAR) and Improvement Plans (IP) that was managed by North Central Texas Council of Governments, a non-profit organization similar to the Council of State governments. Ms. Parry conduct AAR interviews with stakeholders and assisted with the development of the draft and final AARs.

## Relevant Project Experience

### Planning Lead | National Railroad Passenger Corporation (Amtrak) | Hagerty Consulting, Inc.

- Supported the development of Situational Unit Plan and assisted with initial assessment of plan.
- Supporting the coordination of exercise of the multi-hazard planning and risk management process.

### Project Manager Incident Command Structure Training and Exercises | National Railroad Passenger Corporation (Amtrak) | Hagerty Consulting, Inc.

- Served as the project manager and oversaw the development of the Amtrak Incident Management Training and Exercise Program, including the development of an online SCORM-compliant training program developed using the Adobe software suite.

### Project Manager Incident Command Structure | National Railroad Passenger Corporation (Amtrak) | Hagerty Consulting, Inc.

- Served as the program manager for the development of Amtrak's Incident Command Structure.

# Gisele Parry

## Training Specialist



- Led the development of the current version of the Corporate Emergency Plan, the Crisis Communication Plan, the Incident Response Team Standard Operating Procedures, and the Family Assistance Annex. Prior to this effort, Ms. Parry also served as the lead author of the Amtrak Disability Annex.

### **Project Manager for Regional Complex Coordinated Terror Attack Exercise Series | San Diego County | Hagerty Consulting, Inc.**

- Led the design and conduct for a multi-disciplinary / multi-jurisdictional 180-person complex coordinated terror attack exercise involving a terrorist attack in the tunnel of the San Diego Metropolitan Transit System. Ms. Parry is also supporting the development of a full-scale exercise (FSE) is currently scheduled for 2017 that will build upon lessons learned from the tabletop exercise.

### **Project Consultant for Emergency Management Assistance Compact | National Emergency Management Association | Hagerty Consulting, Inc.**

- Serves as a project consultant and technical lead for the National Emergency Management Association NEMA Public Health and Medical Mission Ready Package (MRP) project and for the NEMA Central United States Earthquake Consortium (CUSEC) geological survey and building safety Assessment Project.

### **Project Manager New York State Department of Health Exercise Program | State of New York | Hagerty Consulting, Inc.**

- Served as the project manager for the New York State Department of Health Exercise Program. Led the development and execution of 33 public health exercises involving emergency management, law enforcement, fire, public health, coroners or medical examiner offices, schools, public utilities, elected officials, the American Red Cross, and other nonprofit groups. These exercises followed Homeland Security Exercise and Evaluation Program (HSEEP) methodology and were evaluated using U.S. Department of Homeland Security (DHS) exercise evaluation guides. The after action reports focused on providing realistic recommendations that could be implemented by the various disciplines and organizations participating in the exercise.

### **Planner Nebraska Statewide Exercise Program | State of Nebraska**

- From inception to execution, Supported the development of tabletop, functional, and full-scale exercises across Nebraska to test responses to chemical, biological, radiological, nuclear, and explosive (CBRNE) devices.
- Coordinated exercises in accordance with HSEEP to include the development of scenarios, situation manuals, master scenario events lists, exercise plans, communication directories, and AARs.
- Provided controller/evaluator/simulator/player direction, training materials, and guidance during the event. Acted as controller, evaluator, or simulator during the execution of the exercise.
- Led exercise development for a functional exercise testing Cherry County, Nebraska Emergency Response Center's capability to respond to a terrorist incident. Supported development of all exercise materials, including the AAR, and participated in all planning conferences. Participated as a controller/evaluator for Omaha Operation Secure Metro full-scale exercise.

## Employment History

**Hagerty Consulting, Inc.**, Regional Client Services Director, 2015-Present

**Tetra Tech**, Executive Consultant, 2014-2015

**ICF International**, Senior Manager, 1999-2008

## Education

- Master of Public Administration, Florida International University
- Bachelor of Science, Journalism, University of Florida

## Relevant Highlights

- Lean Six Sigma Yellow Belt
- Driving Government Performance Executive Certification
- Florida International University – Miami, Florida Academy of Strategic Management & Performance Improvement Certification
- Harvard University's John F. Kennedy School of Government
- Data Visualization
- Data Analytics Software
- Database management
- Policy Research and financial trend analysis forecast

## Professional Bio

Ms. Allison Diego is an experienced business manager expert in comprehensive strategic planning and performance management, financial forecasting, budget management, technology systems, and contract and grants management. Ms. Diego's diverse experience includes leading cross-functional work groups, coordinating countywide performance measurement programs, and managing multi-million dollar agency portfolios. She is also proficient in business solutions, data visualization, data analytics software, and database management. She has excellent communication and interpersonal skills.

## Relevant Project Experience

### **Budget and Management Coordinator | Broward County, Florida, Board of County Commissioners (BOCC) Office of Management and Budget- Broward County**

- Managed the County's performance management strategy, developed and coordinated elements of the annual operating and multi-year capital plan, provided financial analysis to guide management decision making, managed special projects, and contributed to policy discussions for Broward County.
- Coordinated the county-wide performance measurement program to promote and improve organizational excellence and to ensure the fiscally responsible allocation of County resources.
- Analyzed agency proposed budgets and funding allocation requests and provided recommendations to County Administrator.
- Conducted policy research, financial trend analysis, and revenue and expenditure forecasts.
- Provided agency guidance and training related to budget policy, information technology systems, and performance management processes.

### **Lead Business Systems Analyst | State of North Carolina Office of Budget and Management**

- Provided strategy leadership and analytical support for the strategic planning, performance improvement, disaster recovery, budget development, budget execution, and financial forecasting initiatives for the State of North Carolina.
- Managed process improvement initiatives, led cross-functional workgroups, and developed recommendations for improving business management workflow and optimization.
- Analyzed business needs to maximize technology solution capabilities, including the design of business intelligence (BI) platforms (dashboards, interfaces/ application programming interface (API)s and collaborative tools).
- Coordinated the State's disaster recovery data analysis to record and visualize expenditure, impacts, and service delivery for senior management and public dashboards.



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- Facilitated feasibility studies and cost-benefit analysis, and presented findings to executive audiences.
  - Developed and provided training materials for business analysts and systems users.

## **Assistant Director | Miami-Dade County | Miami-Dade, Florida, BOCC**

- Directed administrative divisions (Strategic Business and Performance Improvement, Budget & Finance, and Information Technology). Supervision was exercised through subordinate levels of managers and supervisors over a staff of professional and technical employees.
- Managed agency portfolios (\$130 million annual operating budget, a \$400+ million multi-year capital budget, and \$21 million in federal and state grant funding and \$265 million annual operating budget, a \$99 million multi-year capital budget, and \$4.5 million in grant funding).
- Led the Commission on Fire Accreditation International (CFAI) and the Commission for Accreditation of Park and Recreation Agencies (CAPRA) accreditation quality assurance and improvement processes.
- Managed strategic corporate partnerships and secured over \$3 million in private program and capital investments.
- Led the departments' federal and state legislative program and managed over \$22 million in federal and state grant funding annually processed.

## **Employment History**

**Broward County BOCC**, Budget and Management Coordinator, 2018-Present

**State of North Carolina**, Lead Business Systems Analyst, 2016-2018

**Miami-Dade County BOCC**, Assistant Director, 2002-2014

## Education

- Bachelor of Science, Emergency Administration & Planning, University of North Texas

## Relevant Highlights

- Harvard University National Preparedness Leadership Initiative
- Certified Federal Grants Manager
- FEMA Certified Trainer: Hazard Mitigation Planning and the Hazard Mitigation Grant Program
- FEMA Certified Trainer: National Emergency Management Information System (NEMIS)
- FEMA IS: 1,5,7,100.PW, 120, 393, 394,253,292 , 700, 800
- Project Worksheet Development
- Cost estimation
- Grant Management
- Mitigation
- Damage Assessments
- Emergency Management Coordination

## Professional Bio

Ms. Alyssa Carrier is a sought-after management consultant, entrepreneur, and civic leader who serves as a strategic advisor and counselor to leaders at federal and state-level organizations. She is frequently called on to lead projects and assemble teams to provide program expertise and compassionate guidance before, during and after a disaster. Prior to founding AC Disaster Consulting, Ms. Carrier served with Federal Emergency Management Agency (FEMA) Region VIII during Hurricane Sandy, where she led a recovery team. She also served with FEMA Region VI during Hurricanes Katrina and Rita, where she worked in a variety of areas including grant management, mitigation, public assistance, damage assessments, training, and exercises. Ms. Carrier holds more than 17 certifications and has provided hundreds of trainings to states, local governments, attorneys, and emergency managers in more than a dozen states. Her work performance extends across many states and territories, including Colorado, Florida, Louisiana, New Jersey, Puerto Rico, Rhode Island, and Texas. Most recently, Ms. Carrier assisted the City of Mexico Beach and the State of Florida with disaster response and recovery following Hurricane Michael.

## Relevant Project Experience

### Senior Consultant | Florida Division of Emergency Management (FDEM) / DR 4337 | AC Disaster Consulting

- Worked to ensure all documentation was validated and verified, and that eligible Category B expenses were captured while completing FEMA reimbursement packages.
- Served as the liaison between FDEM and more than 70 sheriffs' offices throughout Florida.

### Senior Advisor | City of Mexico Beach / DR 4337 | AC Disaster Consulting

- Provided FEMA eligibility guidance and oversight for the City of Mexico Beach including quantifying infrastructure damages, professional cost estimates, identifying 406 Mitigation opportunities, quality control review for building safety assessments and inspections, and coordinating with the City Engineer and Public Works Director for compliance with environmental permits with the Florida Department of Environmental Protection and US Army Corp of Engineers.
- Supported the City as the emergency support function (ESF)-5, Emergency Management Coordinator, and Liaison to the Bay County Emergency Operations Center (EOC).
- Oversaw the Emergency Debris Removal of powerlines and infrastructure.
- Developed project worksheet damage descriptions, scope of work, and cost estimates for the City's infrastructure damages and debris removal/emergency protective measure tasks.

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- Collaborated with FEMA and FDEM to develop project worksheets in Grants Portal and FLPA.org, gathering required source documents to support all eligible costs.
  - Answered any request for information on behalf of the City and supporting the City's request for reimbursement submittals.

## **Senior Consultant | Puerto Rico Public-Private Partnership Authority | AC Disaster Consulting**

- Responsible for developing and training over 400 municipalities, including Mayors, Government Officials and private-non-profit entities after Hurricanes Maria and Irma. Trainings include the full FEMA Public Assistance (PA) and Mitigation Grant Cycle, procurement, close-out activities, Housing and Urban Development Community Development Block Grant Disaster Recovery (HUD-CDBG-DR), record management, and auditing.
- Provided overall FEMA 428 and Recovery Guidance to Puerto Rico COR3 (Recipients and Sub-Recipients).

## **Employment History**

**AC Disaster Consulting**, CEO, 2018-Present

**Metric Engineering**, Executive Project Manager, 2008-2017

**FEMA**, Hazard Mitigation Specialist/Recovery Lead, 2012-2013

## Education

- Master of Science, Civil Engineering, Florida State University
- Bachelor of Science, Ecology, University of Georgia

## Relevant Highlights

- FEMA CRC Contractor: Coastal Engineering/Coastal Scientist
- USDA NRCS Technical Service Provider (TSP-16-21552)
- FEMA IS: 253.a, 276.a, 280, 318, 321, 322, 393.b, 554, 632.a, 727
- Environmental Restoration
- Building and Infrastructure damage assessments
- Project cost analysis

## Professional Bio

Mr. Cameron Morris has 13 years of experience in environmental consulting and restoration, working both internationally as well as throughout the Southeast and Western United States. Through his diverse experiences working in academia, engineering firms, and for the United States (US) Fish and Wildlife Service, Mr. Morris has acquired skill sets in environmental restoration, watershed threats assessments and inventories, land surveying techniques, as well as biological samplings, assessments, and analysis. Mr. Morris has presented at several national conferences and has strong scientific writing abilities, developing agreements and partnerships for conservation projects, management plans for focal species including state and federally listed species, and submitting permit applications.

## Relevant Project Experience

### **Environmental and Historic Preservation (EHP) Specialist | NISTAC E 18-J-0126, Federal Emergency Management Agency, DR 4383, 4402, 4390, 4393, 4394, 4401, 4411, 4397, 4399, 4408, 4459, 4337, 4348 | Dewberry**

- Performed compliance reviews on building and infrastructure damage assessments, environmental assessments, and engineering evaluations.
- This included technical assistance support for design and construction on a wide range of infrastructure impacted by natural and man-made disasters including acts of terrorism on behalf of the Federal Emergency Management Agency (FEMA) to all states, territories and tribal nations.

### **Project Manager | Mississippi Sound Complex Watershed Management Plan (WMP) | Dewberry**

- Provided environmental planning and engineering services to develop comprehensive WMPs for the Bayou La Batre, West Fowl River, and Dauphin Island Watersheds.
- These plans provided a conceptual course for improving and protecting water quality, habitats, shorelines, public access, culture and heritage, and environmental health and resiliency.

### **Project Manager | County-Wide Integrated Dredge Management Plan, Pasco County, FL | Dewberry**

- Developed an approved Dredge Management Plan for coastal Pasco County, with specific focus on canal systems of several residential neighborhoods with navigational access to the Gulf of Mexico.
- Included within the plan were an initial analysis of each canal system, recommended alternatives, permitting feasibility, project cost estimates and analysis, potential funding sources and leveraging analysis, and a recommended path forward.

## Employment History

**AC Disaster Consulting**, Environmental and Engineering Advisor, 2019-Present

**Dewberry**, Senior Project Manager, 2013-2019

**United States Fish and Wildlife Service**, Biologist, 2009-2019

**Environmental Services Inc.**, Environmental Scientist, 2006-2008

## Education

- Bachelor of Arts, Mass Communications, Texas State University

## Relevant Highlights

- Expertise in the FEMA Public Assistance and Hazard Mitigation Grant Programs
- FEMA IS: 253a, 277a, 1000, 1003, 1004, 1007, 1008, 1009, 1010, 1011, 1012, 1013, 1014, 1019
- Developed and finalized Grant Applications
- Programmatic Expertise
- Updated PWs
- Managed FEMA Public Assistant Teams
- Reviewed HMGP projects
- Project Reimbursement

## Professional Bio

Mr. Lucas Pagan is an experienced emergency manager professional. He has demonstrated a history as a Project Manager working with the Federal Emergency Management Agency (FEMA)'s Public Assistance teams. He also has knowledge of working as a grant monitor for disaster compliance professional services. Mr. Pagan has had the responsibility to oversee projects, funds management, and outreach coordination.

## Relevant Project Experience

### Disaster Recovery Program Manager | Oregon Office of Emergency Management DR 4432 and 4452 | AC Disaster Consulting

- Responsible for implementing and managing FEMA Public Assistance teams at multiple Area Field Offices (AFOs) in the recovery process.
- Worked within applicant side FEMA Grants Portal to update Project Worksheets (PWs) and manage process steps.
- Provided programmatic expertise in developing, completing, reviewing, and navigating grant applications.

### Senior Project Manager | FEMA PA, HMGP, and CDBG Consulting Services DR-4332, DR-4223, DR-4255, DR-4277 | H2O Partners Inc.

- Responsible for implementing and managing FEMA Public Assistance teams in the recovery process.
- Identified eligible projects for reimbursement.
- Managed communications with FEMA personnel throughout the process.
- Worked within applicant side of FEMA Grants Portal to update PWs and manage process steps.
- Reviewed and submitted time extension requests, cost amendments, and other scope of work changes.
- Provided technical assistance to sub-grantees in developing, completing, reviewing, and navigating grant applications.

### Grant Monitor | Governor's Office of Storm Recovery DR 4085 | H2O Partners Inc.

- Responsible for overseeing project eligibility, funds management, and outreach coordination.
- Reviewed Hazard Mitigation Grant Program (HMGP) structural projects for the state.
- Assessed eligibility of Community Development Block Grant Disaster Recovery (CDBG-DR) funding for global match for Hurricane Sandy DR-4085-NY.
- Tracked projects in client system and updated reports weekly.
- Assisted with the development of HMGP and CDBG policies and procedures.

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- Provided technical assistance to sub-grantees and the Governor's Office of Storm Recovery (GOSR) in developing, completing, reviewing, and finalizing grant applications.

## Employment History

**AC Disaster Consulting**, Disaster Recovery Program Manager, 2019-Present

**H2O Partners Inc.** Program Manager, 2013-2019

**FEMA**, Public Assistance Crew Leader, 2010-2013

## Education

- Master of Professional Studies, Emergency and Disaster Management, Georgetown University
- Bachelor of Economics, New York University
- Associate of Arts, Liberal Arts, New York University

## Relevant Highlights

- FEMA Instructor: ICS 300 and 400, NIMS, Continuity of Operations, and G-202 Debris Management
- SE FL Region 7 All-Hazards Incident Management Team, Planning Section Chief and Resource Unit Leader
- Southeast Florida Regional Domestic Security Task Force, Emergency Management Working Group
- International Association of Emergency Managers (IAEM)
- National Emergency Management Associations (NEMA)
- Florida Emergency Preparedness Association (FEPA)
- Emergency Management Institute, National Emergency Management Basic Academy
- FEMA, Advanced Professional Series
- FEMA, Professional Development Series
- FEMA, Continuity of Excellence Series - Professional Continuity Practitioner, Level 1
- Southeast Florida Fusion Center, Terrorism Liaison Officer Level 1
- U.S. Fire Administration, Type 3 All-Hazards Incident Management Team (AHIMT) Training, O-305

## Professional Bio

Ms. Maggie Steenburg is an Emergency Management professional who has experience in the public, private and non-profit sectors. She is skilled in emergency preparedness, disaster recovery, Federal Emergency Management Agency (FEMA) Public Assistance (PA), continuity of operations, writing and updating plans, logistics, and coordination of complex projects. She also has experience with relationship management with public information and messaging. In addition, Ms. Steenburg's experience includes strategic planning, organizational management and operations support.

## Relevant Project Experience

### Grant Specialist | Oregon Military Department Office of Emergency Management, DR 4452 and DR 4432 | AC Disaster Consulting

- Provided customer service, program and policy guidance, and subject matter expertise to the State and Applicants.
- Served as a liaison on behalf of the State of Oregon for all matters related to the administration of Public Assistance within the affected Counties.
- Limited financial risk to the State of Oregon throughout the recovery process and provided overall project management services.

### Crisis Recovery Senior Analyst | DR 4416, DR 4332, DR 4272, DR 4269, DR 4266, DR 4255, DR 4223, DR 4159, DR 4029, DR 1791 | Deloitte and Touche, LLP

- Provided disaster recovery support to the State of Texas and local municipalities for FEMA's Public Assistance grant program.
- Worked closely with applicants, FEMA staff (Program Delivery Manager (PDMGs), Task Force Leaders (TFLs), community recovery centers (CRC), Hazard Mitigation, Insurance and Environmental and Historic Preservation (EHP) specialists), and State grant coordinators from initial recovery scoping meetings through obligation and eventual closeout.
- Performed final state grantee reviews for newly written projects prior to obligation
- Performed detailed compliance reviews for large projects to verify accuracy of grants and funding, and reconcile any accounting, documentation, or eligibility issues prior to final payments.
- Assisted with additional special projects related to state grant management activities as requested.

### Emergency Management Specialist | Palm Beach County Fire Rescue

- On call employee overseeing creation of department wide Continuity of Operations plans, closed Points of Distribution (POD) plan with Department of Health (DOH), and other emergency plans and emergency management projects as needed.



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## Emergency Management Specialist | Delray Beach Fire Rescue, Division of Emergency Management | City of Delray Beach

- Developed, coordinated and implemented emergency management projects and programs.
- Managed and administer the CodeRED Emergency Notification System for the City.
- Served as Continuity of Operations (COOP) program manager.
- Conducted public information and community outreach.
- Drafted, reviewed, and edited plans and policies including: city hurricane plan, debris management plan, DOH closed POD plan, emergency pay policy, Comprehensive Emergency Operations Plan, Emergency Support Function (ESF) annexes, and departmental hurricane checklists.
- Assisted with FEMA Public Assistance Grant Program application for Hurricane Irma reimbursement.
- Emergency Operations Center (EOC) coordinator for the Hurricane Irma, support to City Hall Flood incident.
- Planned and implemented trainings and exercises in Delray Beach.

## Employment History

**AC Disaster Consulting**, Emergency Management Program Manager, 2019-Present

**Deloitte and Touche, LLP**, Crisis Recovery Senior Analyst, 2018-2019

**Palm Beach County Fire Rescue**, Emergency Management Specialist, 2018-2019

**Delray Beach Fire Rescue**, Emergency Management Specialist, 2017-2018

**United Way of Broward County**, Assistant to the Vice President of Program Operations, 2017

**Broward County Emergency Management Division**, Emergency Management Intern, 2016

**Office of President Bill Clinton**, Director of Scheduling, 2013-2015

**William J. Clinton Foundation**, Assistant Director of Scheduling and Advance / Haiti Desk, 2007-2012

**Modo Design**, Office Manager and Assistant to the President, 2004-2007

**Coda International Tours**, Editorial Assistant, 2003-2004

## Education

- Master of Arts, Economic Development and International Economics, Elliott School of International Affairs, George Washington University
- Bachelor of Arts, Political Science and French, Louisiana State University
- Fellow, Loyola Institute of Politics

## Relevant Highlights

- Assistant Commissioner for Disaster Recovery, State of New Jersey, Department of Community Affairs
- Assistant Secretary for Workforce Development, State of Louisiana, The Workforce Commission
- Superior Honor Award, U.S. Department of State
- Group Superior Honor Award, U.S. Department of State
- Board member and Secretary of Volunteers of America –Greater New Orleans

## Relevant Training

- Economic Development CDBG Training,
- Advanced Training for CDBG–DR Grantees
- National Disaster Resiliency Competition Seminar

## Professional Bio

Ms. Stacy Bonnaffons has over 20 years of subject matter expert experience in designing and managing disaster recovery, environmental, and economic development projects both in the U.S. and internationally. In coordination with multiple stakeholders, she has provided technical expertise in determining funding strategies, including both Federal Emergency Management Agency (FEMA) and US Department of Housing and Urban Development (HUD) funds, for recovery and resiliency of housing, infrastructure, and business.

Ms. Bonnaffons served as the coordinator of critical aspects of post-disaster recovery utilizing Community Development Block Grant-Disaster Recovery (CDBG-DR) funds, including needs assessment, outreach, program design, project management and results reporting in several catastrophic-level disasters including Hurricane Katrina, Hurricane Gustav, Hurricane Isaac, Superstorm Sandy and the 2016 Great Floods in Louisiana. She has been engaged in drafting grant proposals to HUD for Rebuild by Design and the National Disaster Resilience Competition (NDRC), as well as serving as advisor to Louisiana OCD on the new CDBG-Mitigation (CDBG-MIT) funds.

She was appointed as the Assistant Commissioner of the New Jersey Department of Community Affairs to manage the Superstorm Sandy recovery efforts, utilizing \$4.1 billion of CDBG-DR funds from HUD. Ms. Bonnaffons also provided disaster recovery consulting to the New York City Office of Management and Budget (OMB) on its \$4.2 billion CDBG-DR allocation from HUD.

As the Deputy Director for the Louisiana Office of Community Development-Disaster Recovery Unit, Ms. Bonnaffons managed the strategy, policy, and efficient implementation of recovery programs supporting the State's mission to build back "safer, stronger, and smarter." She was pivotal in the effective disbursement and administration of over \$13 billion in HUD CDBG-DR federal recovery assistance received as a result of hurricanes Katrina, Rita, Gustav, Ike, and Isaac.

## Relevant Project Experience

### **Project Manager/CDBG Subject Matter Expert | Louisiana Office of Community Development (OCD) CDBG-DR Advisory Services | CSRS**

- Provided executive-level technical support to LA OCD management in drafting CDBG-DR program policies and Action Plan Amendments.
- Provided support on management of the Restore Homeowner Repair and Reconstruction program for recovery from the LA Great Floods of 2016.

### **Project Manager | Louisiana OCD Watershed Initiative**

- Served as technical advisor on CDBG rules and regulations and design of program policies and procedures for the \$1.2 billion initiative.

## **Assistant Commissioner | State of New Jersey Sandy Recovery Program**

- Led the post-disaster management of recovery efforts utilizing \$4.1 billion of CDBG-DR funds from HUD.
- Coordinated the rapid launch of 17 recovery programs within one month of federal grant allocation approval.
- Provided direction and oversight for the needs assessment, Action Plan and Amendments, program design, engagement with partner agencies, nonprofits, and community organizations, and ensuring public access, while closely monitoring compliance and adherence to State and federal standards and requirements.
- Managed and supported various levels of audit from the Office of Inspector General, HUD Monitors, and internal auditors.

## **Senior Grants Advisor/CDBG-DR Subject Matter Expert | New York City Office of Management and Budget | Hagerty Consulting, Inc.**

- Served as a subject matter expert to the New York City (NYC) Office of Management and Budget (OMB) for Sandy Recovery on implementation of programs funded by the CDBG-DR funds allocated by HUD in response to Superstorm Sandy. NYC OMB is responsible for the management and oversight of all aspects of the city's CDBG-DR allocation including the program to rebuild single family and multifamily housing and monitoring federal compliance.

## **Employment History**

**CSRS, Inc**, CDBG-DR Subject Matter Expert/Program Manager, 2016-current

**Hagerty Consulting**, Senior Grants Advisor/CDBG-DR Subject Matter Expert, 2015-2016

**State of New Jersey, Department of Community Affairs**, Assistant Commissioner, 2013-2015

**Louisiana Office of Community Development/LA Recovery Authority**, Chief of Staff/Deputy Director, 2009-20013

**LA Workforce Commission**, Assistant Secretary for Workforce Development, 2008-2009

**Shaw Environmental & Infrastructure, Inc**, Deputy Project Manager for Disaster Recovery, 2005-2008

**United States Trade and Development Agency**, Asia Regional Program Manager, Bangkok, Thailand 2002-2005

**US-Asia Environmental Partnership, U.S. Commercial Liaison Office to the Asian Development Bank**, Regional Environmental Specialist, Manila, Philippines, 1995-2001

**International Resources Group, Ltd**, Economic Development Associate, 1993-1995

## Education

- Master of Regional Planning, Cornell University
- Certificate in Urban Redevelopment, University of Pennsylvania, Philadelphia
- Bachelor of Arts, Biology and Environmental Studies, Oberlin College

## Relevant Highlights

- American Planning Association National Best Practices Award: for Resilient New Orleans, City of New Orleans' Resilience Strategy
- Rockefeller Foundation Redevelopment Fellow, Center for Urban Redevelopment
- Expertise in resilience planning, urban planning, project management, housing and community development, and sustainable program design

## Professional Bio

Mr. David Lessinger's career has been focused on resilience, risk mitigation, urban planning and redevelopment, and local government operations. He serves as a Senior Advisor with CSRS' Resilience Practice, helping governmental clients adapt to the challenges of a changing economy, a changing environment, and a changing population. Mr. Lessinger and his team members provide technical assistance to identify risks and vulnerabilities, develop strategic interventions, and design and implement resilience programs, as well as integrate resilience and sustainability into existing capital programs.

## Relevant Project Experience

### Project Manager | Louisiana Office of Community Development Watershed Initiative | CSRS

- Serves as a project manager, providing technical assistance to state and municipal entities to build their capacity to develop flood resilience strategies and watershed management programs.
- Supporting a program to align government water management policies to reduce flood risk and spend over \$1.2 billion of Community Development Block Grant-Mitigation (CDBG-MIT) funds on watershed management and flood risk reduction projects, policies, and programs. CSRS is the state's primary program management consultant for this initiative.

### Resilience Advisor | City of Boulder, Colorado, Budgeting for Community Resilience | CSRS

- Served as a Resilience Advisor providing guidance on best practices for integrating measurable outcomes for the city's goals into the city budgeting process.
- Worked with City staff to develop key performance indicators to assess the impact of investments in resilience and sustainability and seek ways to optimize the City's effectiveness.
- Supported Boulder's Sustainability and Resilience Framework and Resilience Strategy to position its communities to rebound, adapt to, and thrive amidst changing conditions and challenges. In this project, Boulder sought to move beyond resilience planning toward the institutionalization of resilience through its city budgeting process.

### Senior Project Manager | City of New Orleans, Louisiana, Resilient New Orleans Initiative

- Supported both the development of the City's resilience strategy and its implementation across city government, integrating it into the City's budgeting process and updating the City's strategic framework to include resilience and sustainability.

- Launched in 2015, *Resilient New Orleans* received American Planning Association's National Best Practice Award in 2016, has become a model for cities around the world, and has been a vehicle for raising millions of dollars of capital to implement adaptation projects throughout the City.

## **Sr. Project Manager | Gentilly Resilience District | City of New Orleans | 2014 - 2016**

- Project-managed the development of the City of New Orleans' Phase I and Phase II applications to the US Department of Housing and Urban Development (HUD's) National Disaster Resilience Competition which resulted in the City being awarded \$141 million to implement the Gentilly Resilience District, the second largest award in the country and one of 13 awards nationally out of over 60 applicants. This included developing the project metrics, the initial program design for homeowners to develop stormwater interventions on their property, as well as major capital projects designed to reduce flood risk and provide additional benefits such as recreational and educational uses, and spur economic reinvestment.

## **Employment History**

**CSRS, Inc.**, Sr. Advisor, Resilience Practice, 2018-Present

**City of New Orleans**, Chief of Staff to Deputy Mayor/Chief Administrative Officer/Chief Resilience Officer, 2016-2018

**New Orleans Redevelopment Authority**, Director of Planning and Strategy, 2012-2016

**City of New Orleans**, Deputy Director, Neighborhood Revitalization, 2011-2012

**Neighborhood Housing Services**, Director – Community Building Initiative, 2007-2011

## Education

- Master of Science, Agronomy, Louisiana State University
- Bachelor of Science, Environmental Management Systems

## Relevant Highlights

- Spatial Analysis for Hazard Reduction
- Program Management and Project Execution
- Benefit Cost Analysis Calculation

## Relevant Training

- Licensed Geographic Information Systems Professional (GISP), Louisiana Lic. No. 0006194
- Certified Floodplain Manager (CFM), License No. US-12-06389

## Professional Bio

Mr. Mark Forsyth is a Geographic Information Systems Professional (GISP) with over 16 years of experience in the GIS field. He is responsible for project management, providing GIS database development, analyses, and map and report production for complex research, survey, planning, and impact assessment projects. Relevant to hazard mitigation planning, he brings a wealth of experience with US Army Corps of Engineers (USACE) Benefit-Cost Analyses (BCAs) and flood modeling and mapping.

## Relevant Project Experience

### GIS Project Manager | City of Central, Louisiana, Drainage Master Plan

- Led a team in the development of a project base map detailing the master plan efforts during the project and to support Central's FEMA-approved Hazard Mitigation Grant Program (HMGP) project.
- Developed an ArcGIS Online application that was used by the project team to display GIS and other model outputs. Created a detailed structure inventory for input, along with HEC-RAS flood depth outputs, into HEC-FIA to estimate damages associated with 10-, 50- and 100-year floods events in the project area.

### GIS Project Manager | Calcasieu Parish, Louisiana, Drainage Master Plan

- Worked with Parish and CSRS staff to assist in the development of Parish plan maps and project figures. Led the effort to develop a parish-wide Esri ArcGIS Online that was used to inform the client and eventually the public of Master Plan goals.
- Worked with parish staff to develop a project base map that will be used in the final master plan documents as well as all public outreach efforts.
- GIS Project Manager | Terrebonne Parish, Louisiana, Isle de Jean Charles Resettlement Project – Phase III
- Utilized drone technology to support a corridor survey along LA Highway 24 for final design of the wastewater system for the new community.
- The project, funded through HUD's National Disaster Resilience Program, involved the master planning of a new development to accommodate the voluntary resettlement of an island community in response to significant environmental degradation from ongoing coastal land loss, subsidence, and sea level rise.

## Employment History

**CSRS**, GIS Project Manager, 2018-2019

**GEC**, GIS Program Director, 2013-2018

**GEC**, GIS Lab Manager, 2006-2013

**CEI**, GIS Department Manager, 2004-2006

**CEI**, GIS Analyst, 2000-2004

**Louisiana State University**, Research Associate, 1999-2000

## Education

- Bachelor of Arts, General Studies, Louisiana State University

## Relevant Highlights

- Group Supervisor, FEMA Public Assistance, Louisiana Recovery Office
- Technical Assistance Liaison, FEMA-HMGP, City of Central
- Closeout Grants Manager, Louisiana State University Health Care Service Division

## Relevant Training

- Multiple courses through FEMA for PA and HMGP 404
- Multiple courses through OCD for CDBG-DR and CDBG-MIT

## Professional Bio

Ms. Suzanne Settoon has 11 years of experience in emergency management and disaster recovery with the Federal Emergency Management Agency (FEMA) and Small Business Association (SBA). She was a member of FEMA's Cadre of On-Call Response/Recovery Employees (CORE) at FEMA's Louisiana Recovery Office within the Branch of Public Assistance (PA) for eight years. Mrs. Settoon served in multiple capacities from Project Specialist (PS) to Public Assistance Group Supervisor (PAGS). She worked within multiple disasters beginning with Hurricane Katrina (DR-1603), Hurricane Rita (DR-1607), Hurricane Gustav (DR-1786), Hurricane Ike (DR-1792), Hurricane Isaac (DR-4080), and most recently, Red River Flooding (DR-4228) and Louisiana Severe Storms and Flooding (DR-4263). Prior to her experience in PA, Mrs. Settoon worked within the Branch of Individual Assistance (IA) for two years as a Team Lead within the Applicant Services department, in which she worked with state, local, and voluntary agencies in providing temporary housing solutions to disaster survivors.

Mrs. Settoon joined CSRS in 2016 after the historic flooding of August 2016 in the Baton Rouge, Louisiana, area. She has led a team of grants managers to address all aspects of the City of Baton Rouge's flood recovery, providing her technical advice to guide the City through the maze of compliance requirements, meet program deadlines, and maximize their reimbursements. She also leads the efforts to develop feasible and effective Hazard Mitigation projects on behalf of the City of Central, Louisiana.

## Relevant Project Experience

### Technical Assistance Liaison | City of Central, Louisiana, 2016 Great Flood / Disaster Recovery Grants Management

- Leads the efforts to develop Hazard Mitigation Grant Program (HMGP) applications on behalf of the City of Central.
- Assisted in scope development, scheduling, and cost estimating for development and submittal of a quality application for FEMA consideration and approval. Developed and brought to the community for adoption five hazard mitigation drainage projects, which include upsizing of culverts to sustain a 25-year storm, as well as development of a buyout initiative within the city limits.

### Closeout Grants Manager | Louisiana State University Health Care Division Disaster Stafford Act Closeout Activities

- Assisted and managed a staff of two closeout specialist in the reconciliation and closeout process for Hurricanes Katrina, Rita, Gustav, Ike and Isaac FEMA funded projects. Manage client expectation, billing, and forecasting of program timeline.

## **Senior Grants Manager | | East Baton Rouge, Louisiana City and Parish 2016 Flood Disaster Recovery Grants Management**

- Responsible for overseeing all infrastructure projects eligible for repair or replacement through the FEMA PA program.
- Managed a team consisting of project specialists, cost estimators, and closeout specialists. Met with City officials and department directors to identify damages incurred by each of the City's departments, seek HMGP opportunities for applicable projects, review all project request for forwarding to FEMA, including cost estimates; manage project priorities, oversee project reimbursement request from the Louisiana Governor's Office of Homeland Security and Emergency Management (GOHSEP), and manage closeout activities of all projects.
- Asked to take on additional project management tasks in March 2017 for the City of Baton Rouge Recovery Project. These duties included managing hours billed to the project, reviewing client invoicing generated by project controls to ensure accuracy, forecasting project completion for each project through closeout, forecasting staffing needs through project completion.

## **Employment History**

**CSRS**, Grants Manager, Program Director, 2016 -2019

**Department of Homeland Security - FEMA**, Team Lead, 2007 – 2016

**Small Business Administration**, Office of Disaster Assistance, Supervisor, 2005 – 2007



## Education

- Bachelor of Science, Civil Engineering, Colorado School of Mines

## Relevant Highlights

- Expertise in analysis, auditing, cost reasonableness analysis, and process improvement
- Experience in the PA program, including grant closeout, project worksheets, and reimbursement  
Successfully supported more than \$100 million in federal recovery grants

## Relevant Training

- Multiple FEMA PA Training Courses

## Professional Bio

Jill Olson has over 13 years of comprehensive and varied experience in disaster response and cost recovery operations in both the Individual Assistance (IA) and Public Assistance (PA) sectors, primarily as a Grants Manager, PA Funding Specialist, and Closeout Specialist. Her accomplishments include the reconciliation of over \$7 million in direct administrative costs (DAC), and facilitation of the closeout of over \$10 million for the New Orleans, Louisiana, Regional Transit Authority (NORTA) and St. Bernard, Louisiana, Parish Government. Ms. Olson's expertise in the FEMA PA Program includes generating over \$100 million in federal reimbursements, while also reconciling and managing grant closeout of over \$50 million in infrastructure-related project worksheets (PWs).

## Relevant Project Experience

### Senior PA Grants Management Specialist | East Baton Rouge City and Parish 2016 Flood Recovery | CSRS

- Collaborates with various funding agencies and internal City-Parish departments to ensure the proper use and application of federal and state funds. Supporting the build-back of the numerous facilities damaged or destroyed resulting from the massive inundation.

### Grants Management/ FEMA Public Assistance Funding and Policy Specialist | City of New Orleans, Louisiana, Hurricane Katrina Recovery | CSRS

- Oversaw operations for the grants management of hundreds of facilities owned by the City of New Orleans. These facilities ranged from police stations to roads that sustained damages from Hurricanes Katrina, Gustav, and Isaac valued at over \$1.1 billion.

### Grants Management/FEMA Public Assistance Funding and Policy Specialist | New Orleans Regional Transit Authority Hurricane Katrina Recovery | CSRS

- Leading a joint effort between NORTA and the Louisiana Governor's Office of Homeland Security and Emergency Management (GOHSEP) to resolve numerous issues delaying the closeout of 12 FEMA PWs.
- Analyzed, audited, and wrote several cost reasonableness and sole source justification memos, resulting in GOHSEP's approval of over \$10 million in expenses.

### Senior PA Funding and Closeout Specialist | St. Bernard Parish, Louisiana, Hurricane Katrina Recovery | CSRS

- Audited over seven years of project management and DAC invoices, which resulted in the reallocation of \$7.1 million and eliminated the project's negative balance with GOHSEP.

- Led the PW reconciliation process by auditing grants, expenses, payments, and documentation, and identifying when a project is ready to be closed. In addition, responsibilities included writing PW version requests and performing cost reasonableness analyses.

### **Senior PA Funding and Closeout Specialist | City of New Orleans Project Delivery Unit**

- Generated over \$100 million in FEMA Public Assistance reimbursements for the City's Department of Public Works (DPW) by working closely with GOHSEP, DPW vendors, and project managers. Responsibilities included managing DPW and Hazard Mitigation funding advance requests, providing GOHSEP with cost reasonableness memos, creating ad hoc and standardized reports, utilizing various datasets including LouisianaPA.com, and managing the audit and closeout of FEMA DPW Projects.
- Submitted over 60 DPW projects for closeout worth over \$50 million.

## **Employment History**

**CSRS**, Senior Public Assistance Program Specialist, 2015-present

**City of New Orleans**, Public Assistance Funding and Closeout Specialist, 2012-2014

**Hagerty Consulting**, Public Assistance Consultant, 2011-2012

## Education

- Bachelor of Arts, Sociology, University of Utah

## Relevant Highlights

- 14 years of Public Assistance experience
- Experience managing billions of dollars of PA grants
- Experience training staff on proper PA policies and procedures

## Relevant Training

- Certified Floodplain Manager (Certification#US-15-08766), credentialed by the Association of State Floodplain Managers (ASFPM)

## Professional Bio

Ms. Sunny Smith has 14 years of experience in the Federal Emergency Management Agency (FEMA) Public Assistance (PA Program). Ms. Smith has managed PA projects for Hurricanes Katrina, Rita, Gustav, Ike, and Isaac, totaling more than \$3.5 billion in FEMA PA grant funding. She is a Certified Floodplain Manager (CFM) credentialed by the Association of State Floodplain Managers (ASFPM) Board of Regents. She is also a Certified PA Appeals Analyst Credentialed by the FEMA Public Assistance Appeals Branch (PAAB). Ms. Smith has expertise in PA Policy and complex knowledge of laws, regulations, and policy updates of the Stafford Act and Sandy Recovery Improvement Acts.

## Relevant Project Experience

### Senior PA Policy Specialist/Grants Management Team Lead | Ascension Parish, Louisiana, School Board (APSB) Flood Recovery

- Manages \$80 million in FEMA recovery grants for APSB. Responsibilities include overall grants administration including assessments of flood damaged buildings, compliance, and close-out.
- Works with federal, state, local, and private agencies for maximizing & ensuring compliance of FEMA, CDBG, Local & Private funding grants. Responsible for leading the damage assessment team evaluating 72+ flood-damaged buildings. Also responsible for responding to audit inquiries from the FEMA Office of Inspector General (OIG), Louisiana Legislative Auditors, and APSB Auditors.
- Was instrumental in lobbying the US Congress for changes to the way FEMA executes mandatory National Flood Insurance Program (NFIP) reductions to PA Grants for DR-4277. H.R. 302 passed in the fall of 2018 making the mandatory flood reductions one-per-campus rather than the existing one-per-building, netting APSB an additional \$8 million in recovery grant funding previously unavailable to them.

### Public Assistance Program Specialist | State of Louisiana Office of Risk Management

- Provided expert knowledge of FEMA Public Assistance Program eligibility and integration with mitigation, insurance and other grant funding sources.
- Participated in educating applicants on specific program issues, procedures, and development and review of projects for compliance.
- Managed all Louisiana Severe Storms and Flooding (DR-4263) projects for the Office of Risk Management (ORM) totaling \$18 million in flood damages throughout the State of Louisiana. Responsibilities included building damage assessments, writing damage descriptions and dimensions, scopes of work, project worksheet writing, eligibility negotiations, and overall grants management for all Louisiana state agencies.

## **Public Assistance Program Specialist/Task Force Lead/Public Assistance Group Supervisor | FEMA**

- Managed PA projects for five major disasters (Hurricanes Katrina, Rita, Gustav, Ike, & Isaac) throughout Louisiana totaling more than \$3.5 billion in grants.
- As the FEMA Education Team Lead, managed all PA Projects for secondary and higher educational facilities throughout south Louisiana and was instrumental in the obligation of the two largest PWs in national history (at the time) for Recovery School District and Orleans Parish School Board.
- Responsible for implementing changes/revisions to law, regulation and policy for these major disasters including recent changes to the Stafford Act and Sandy Recovery Improvement Act that resulted in significant changes to the PA Program.
- Produced audit responses for PA projects for the Office of Inspector General (OIG) and implemented appeal responses from Region 6 and FEMA headquarters in Washington, DC.
- Oversaw financial management of PA grants, including monthly, quarterly, and annual financial projections for grant and staffing expenditures.
- Educated PA Applicants on Federal, State, and local project eligibility procurement laws. Served as PA Group Supervisor, QAQC Team Lead, New Orleans Education Team Lead, Central Parishes Team Lead, Project Officer, and Resource Coordinator over her 10-year career with FEMA.

## **Employment History**

**CSRS, Inc.**, Sr. FEMA Policy Specialist, 2016-present

**DMS Disaster Consultants**, Public Assistance Program Specialist, 2015-2016

**FEMA**, PA Program Specialist, Task Force Lead, Public Assistance Group Supervisor, 2005-2015

## Education

- Bachelor of Arts, Accounting, Southern University at New Orleans

## Relevant Highlights

- 10 years of experience working at FEMA
- Experience with the FEMA PA Program
- Successfully hundreds of millions of dollars of FEMA PA grants

## Relevant Training

- Multiple FEMA related Public Assistance Training Courses

## Professional Bio

Ms. Wanda Holliday has a total of 13 years of experience in emergency management and disaster recovery, including 10 years as a Federal Emergency Management Agency (FEMA) Cadre of On-Call Response/Recovery Employees (CORE) employee at FEMA's Louisiana Recovery Office within the Branch of Public Assistance (PA). Ms. Holliday served as a PA Crew Leader over multiple disasters beginning with Hurricane Katrina (DR-1603), and including Hurricane Rita (DR-1607), Hurricane Gustav (DR-1786), Hurricane Ike (DR-1792), and Mississippi River Flood (DR-4015). Ms. Holiday worked within the Branch of Individual Assistance (IA) for two years as a Pre-Placement Interviewer to assist in providing disaster survivors temporary housing solutions.

## Relevant Project Experience

### Closeout Specialist | Louisiana State University (LSU) Health Care Service Division (HCSD) Disaster Stafford Act Closeout Activities

- Managed grant closeout activities for LSU HCSD hospitals for several hurricane-related projects valued at over \$185 million.
- Ensured procurement for all grants were compliant for the successful execution of project closeout, and prepared cost analyses, comparisons, and estimates for improperly procured contracts.
- Tasked with the reconciliation of all obligated funding and review of State Closeout documents. Assisted with complex problems through effective and efficient resolutions that were compliant with federal and state regulations and policies.

### Public Assistance Crew Lead | FEMA

- Educated applicants on federal, state, and local project eligibility and procurement laws.
- Reviewed projects prepared by Project Specialists for compliance with the Stafford Act and Title 44 of the Code of Federal Regulations (CFR). Oversaw the processing of applicants' grants to ensure continuity of service throughout the delivery of the FEMA PA Program.

## Employment History

**Trigon Associates**, FEMA Closeout Specialist, 2015 - 2019

**Department of Homeland Security / FEMA**, Public Assistance Crew Leader, 2009 - 2015

**Express Personnel Services**, Pre-Placement Interviewer FEMA, Individual Assistance, 2005 - 2006

## Education

- Master of Environmental Planning, Metropolitan University, (In Progress)
- Bachelor of Science, Anthropology, Florida State University
- Associate in Arts, Tallahassee Community College
- Real Estate Broker Course, Coldwell Banker's, Real Estate Institute

## Relevant Training

- "Handling Difficult Project Situations", 1 PDU, March 5, 2015, Project Management Institute
- "Project Management Professional (PMP)" Certificate, 36 contact hrs.
- "Legal Aspects I (Real Estate)". Certificate, 3 credit hours. Coldwell Banker's Inst. of Real Estate
- Federal Emergency Management Agency (FEMA), Emergency Management Institute
- IS- 01016 Environmental and Historic Preservation Considerations/ Compliance for PA Grants
- IS-00634 Introduction to FEMA's PA Program
- IS-100b Introduction to Incident Command System
- IS-00253a Overview of FEMA Environmental and Historic Preservation Review Responsibilities

## Professional Bio

Ms. Raquel Camacho has over 19 years of experience managing projects for public and private clients providing project management, community outreach, permitting and cultural resources management services. She has extensive experience in estimating and assessing the effects of man on the environment and evaluating project impacts on human (social) and cultural resources. Her areas of expertise includes archaeological studies (Phases 1A, 1B, II and III). Her technical duties have included social and cultural resources assessments for existing and new facilities; preparation of Environmental Impacts Statements, National Environmental Protection Act reviews, federal & local permits, US Army Corps of Engineers (USACE) compliance, preparation and monitoring of mitigation plans and cultural resources monitoring during construction, proposed land development, transportation, and infrastructure improvements.

## Relevant Project Experience

### Environmental Affairs and Risk Mitigation Manager | Puerto Rico Disaster Recovery Energy Sector Office Program | CSA Group

- Assisted the Puerto Rico Electric Power Authority (PREPA) in the successful application for award management of emergency work recovery funds granted by the Federal Emergency Management Administration (FEMA) and the U.S. Department of Housing and Urban Development (HUD).

### Agency Liaison for the Department of Education | Hurricane Maria Response, Recovery and Resilience | CSA Group

- Worked as an Agency Liaison for the Puerto Rico Department of Education for this initiative.
- Supported Hurricane Maria recovery with comprehensive emergency management and disaster recovery services designed to ensure that Puerto Rico optimizes its reimbursement for disaster-related damages from all available federal sources.

### Operations Manager | New York City Housing Authority (NYCHA) Recovery to Resiliency Program, Sandy Program Unit (SPU), | CSA Group

- As the Operations Manager of the SPU Community Outreach Team (COT), the main objective was to avoid delays to the program's schedule caused by lack of, or miscommunication. Maintained communication for the program's stakeholders, including residents, community leaders, elected officials and other governmental agencies personnel, so they are informed of the program's progress and activities.
- Completed an emergency survey and assessment of all mechanical, electrical and plumbing systems for five severely damaged public housing developments. These developments included a total of 57 buildings and 4,525 units. The findings and evaluation of all systems were presented along with an order of magnitude estimate for recommended repairs and mitigation measures.

## Employment History

CSA Group, Project Manager, 1998-Present

## Education

- Master of Science, Environmental Engineering. Georgia Institute of Technology
- Bachelor of Science, Civil Engineering. University of Puerto Rico

## Certifications

- Professional Engineer  
Puerto Rico License #13025  
Florida License # 79164  
Maryland # 46869  
New York # 095322-1

## Relevant Highlights

- Extensive expertise in wastewater and wastewater treatment
- Diplomate by the American Academy of Environmental Engineering
- College of Engineers and Land Surveyors of Puerto Rico
- Former President, Puerto Rico Society of Professional Engineers
- Water Environment Federation – Member of Stormwater Committee
- Puerto Rico Water and Environment Association

## Professional Bio

Mr. Hans Figueroa has 25 years of experience as a civil and environmental engineer in the design, specification, analysis, and studies associated with water and wastewater treatment and conveyance infrastructure. Mr. Figueroa also has experience in feasibility studies for industrial, commercial and residential projects, as well as in environmental assessment, storm water management, MS4 and environmental permitting. He leads the Water Resources team at CSA, which provides a variety of services to water utilities including compliance assistance, peer review, capital improvements, cost analysis, project and program management services. For the past five years, Mr. Figueroa has been working on sustainability and green infrastructure projects. Recently, he has been managing recovery efforts from the damage of Hurricanes Irma and Maria to the Puerto Rico Water and Sewer Authority.

## Relevant Project Experience

### Owner's Representative | Puerto Rico Water and Sewer Authority (PRASA) Hurricane Irma and Maria Recovery Efforts | CSA Group

- Leads the damages documentation, assessments, cost estimation, and project activity reconciliation that is required as part of FEMA's Public Assistance (PA) program.
- Provided resources to help PRASA monitor and control emergency work being performed within PRASA's five regions and 19 operational areas; including but not limited to debris removal, emergency protective measures, and temporary solutions to mitigate existing and potential risks of health and safety of Puerto Rico's citizens. PRASA has over 1,400 pump stations and 100 water and wastewater treatment plants across the island. The PA program is expected to manage up to \$300 million in refunds associated to emergency response work.

### Quality Control/Assurance | CDBG-DR Sandy Recovery, NYS GOSR | CSA Group

- Working as a subconsultant to the Program Manager, provided resource management and technical assistance to prepare engineering and architectural services cost reasonableness estimates for community restoration projects related to the impact of extreme storm events.
- The projects included a variety of scope ranging from directly related projects such as storm sewer infrastructure repair including hydraulic and hydrologic studies, to feasibility studies for the reconstruction of an emergency response shelter.

## Employment History

**CSA Group**, Civil Engineer, 2011-Present

## Education

- Master in Architecture, University of New Mexico
- Bachelor of Art, Architecture, University of New Mexico,

## Relevant Highlights

- Decades of experience as an architect
- Decades of experience in emergency management
- Thomas Arkle Clark Award
- Member, American Institute of Architects – Puerto Rico Chapter
- Design Award -Parque Cuatro Calles – Ponce, PR
- Design Award – Casa Micheo Marcial, Caparra, PR
- Piscina y Terraza Del Valle –Los Paseos San Juan, Puerto Rico

## Relevant Training

- FEMA: IS-634, Introduction to FEMA's Public Assistance Program
- FEMA: IS-1013 – Costing- Estimates and the Cost Estimating Format

## Professional Bio

Mr. Jose Lopez has been a registered architect for over 30 years with extensive and diverse FEMA experience. He has worked in the private and public sector. Mr. Lopez has excellent communication skills and excels at teamwork in both leadership and support roles. He performs well under pressure, prioritizing and managing multiple tasks and goals. He has vast experience in design, construction administration, as well as assessment of structural damages to buildings and recommended mitigation measures to minimize future damages.

## Relevant Project Experience

### Project Manager | Puerto Rico Army National Guard (PRANG) Hurricane Maria Damage Assessment Services | CSA Group

- Oversaw services related to the assessment of damages incurred as a direct result of Hurricane Maria for facilities located in San Juan, Camp Santiago in Salinas and Fort Allen in Juana Diaz. The scope of work was to identify storm related damages and quantifying the elements into units of measurements in order to provide a cost estimate for the materials, labor and soft costs to perform the repairs/replacements.
- Tasked to identify possible measures to mitigate repairs in order to minimize future damages. Resulting reports were used to validate FEMA's findings of the same facilities.
- Identified pre-existing conditions of the buildings in order to allow PRANG to request additional funding through FEMA's 404 Hazard Mitigation Grants Program.
- Developed a customized data platform to identify, quantify, photograph and describe the specific damages found at these sites. This platform enabled compilation of specific data and produce reports tailored for the needs of the client.

### Project Manager | Hurricane Maria Response, Recovery and Resilience Program Management Office (PMO) | CSA Group

- Worked as a Liaison between the Governor's Authorized Representative at the Joint Federal Office and the CSA Group Subgrantee Liaisons teams to ensure proper communications regarding regular program policies and disaster specific policies and regulations for the FEMA Public Assistance Program.
- Provided Subgrantees counseling on eligibility issues and strategic actions to maximize federal funding in a prompt manner.
- Supported the Hurricane Maria PMO with comprehensive emergency management and disaster recovery services designed to ensure that Puerto Rico optimizes its reimbursement for disaster-related damages from all available federal sources.



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## **Project Manager | Hurricane Maria / Ryder Hospital and Bella Vista Hospital A&E Services | CSA Group**

- Maintained the project on time and on budget. Served as the principal point of contact with the client.
- Ryder Memorial Hospital, Inc., and Bella Vista Hospital contracted CSA separately to provide the technical assistance needed in order to prepare the requested forms and documents for the participation of the facility in the request for fund based on the 2018 Bipartisan Budget Act Section 20601, Section 428 Public Assistance Alternatives Procedures, Guide for Permanent Work FEMA-4339-DR-PR.
- The healthcare facility in Humacao is about 350,000 square feet and the healthcare facility in Mayaguez is about 150,000 square feet. The scope of work included: Identify the infrastructure of damages incurred by Ryder as a direct result from the path of Hurricane Maria; Identify the pre-existing damage of the infrastructure found at Ryder; Identify components of the facility or system not damaged by Hurricane Maria to fully effectuate the replacement or restoration of disaster-damaged components to restore function to industry standards; Identify components of the facility to make it more efficient and if possible self-sustaining.

## **Employment History**

**CSA Group**, Market Segment Leader, 2017-Present

**FIA Healthcare Architects**, Project Manager, 2008-2017

**Ewing Cole –Architects, Engineers, Interior Designers, Planners**, Project Manager, 2006-2008

## Education

- M.S. Business Administration, University of Miami
- Continuing Studies, Construction Management, University of Miami
- Computer Science, ITESM, Monterrey, Mexico

## Relevant Training

- FEMA: IS-00100.c, Introduction to Incident Command System, ICS-100
- FEMA: IS-00200.b, ICS for Single Resources and Initial Action Incident, ICS-200
- FEMA: IS-00700.b, An Introduction to National Incident Management System
- FEMA – IS-634, Introduction to FEMA's Public Assistance Program
- FEMA: IS-01013 Costing- Estimates and the Cost Estimating Format
- CTQP Asphalt Paving Technician Level 1
- CTQP Final Estimates I

## Professional Bio

Mr. Ernesto Marin has over 35 years of experience in project management, project engineering, construction management, bidding, contract management and administration, inspection, estimating and scheduling. His experience includes working on international and a variety of locations in the United States.

## Relevant Project Experience

### Logistics Officer | Hurricane Irma / Debris Monitoring Program for Miami-Dade County, Florida, Public Schools | CSA Group

- Served as the Debris Monitoring / Logistics Officer and was responsible for validating information in database and ensuring FEMA compliance.
- As a result of the passage of Hurricane Irma, over 400 schools had negative impacts in their properties.
- Provided monitoring services initially for contractor's working a force account basis and later monitored hangers and leaners cutting operations as well as debris hauling. Debris monitoring and reporting included over 400 schools affected by Hurricane Irma. Over 50 debris monitors, 5 prime contractors, 240+ trucks certified and over \$4 million in debris removal up to date. Field work related to recording the status of debris removal at various school locations in North Miami following Hurricane Irma.

### Construction Manager | Miami-Dade County, Florida, Flooding / FEMA-funded Reconstruction Program – DR-1345 | CSA Group

- Served as the Construction Manager for engineering and construction of over 3,000 sites damaged by flooding in Miami-Dade County.
- This \$350 Million Program included assisting with contracting and oversight of over 150 consultant and contractors that participated in the program.

### Project Manager | Hurricane Wilma Debris Monitoring, Program – DR-1609 | CSA Group

- Was responsible for construction management, debris monitoring, and inspection services for the Hurricane Recovery Program established to manage the recovery efforts after the 2004 and 2005 hurricanes. The program resulted in the administration of over \$100 Million in various contracts.

## Employment History

**CSA Group**, Contracts Administrator/Project Manager, 2002-Present

**Condote America, Inc.**, Senior Project Engineer and Project Manager, 1999-2002

**ICA Construction Corporation**, Vice President, 1998-1999

## Education

- Bachelor of Science, Civil Engineering, University of Puerto Rico, Mayagüez

## Certifications

- Professional Engineer: Puerto Rico License No. 7157
- Puerto Rico College of Engineers and Land Surveyors

## Relevant Training

- FEMA: IS-1013 – Costing-Estimates and the Cost Estimating Format

## Relevant Highlights

- Over 40 years of experience in project management and engineering

## Professional Bio

Mr. Peter Martínez has over 40 years of experience in project management, site civil engineering, and highway design, often working in the role of client liaison, scheduling, supervision of subconsultants, and responsibility for staff engineers and Computer-Aided Design (CAD) operators. He has worked with projects executed from schematic conceptual design through final construction documents and construction supervision. Mr. Martínez has participated in projects in Puerto Rico, the U.S., Haiti, and the Dominican Republic.

## Relevant Project Experience

### Senior Civil Engineer | Post-Hurricane Maria Eastern Federal Land Damage Assessments | CSA Group

- Performed site visits and prepared reports of damaged roadways.
- In the eastern region of Puerto Rico, provided engineering services for site visits, reports, plans and other supporting documents. This documentation formed the basis for determination of eligibility and review for the FEMA Public Assistance Program (PA) to establish the scope and cost of repairs.

### Senior Engineer | North Park, Caribbean Petroleum Refining (CAPECO) | CSA Group

- Was responsible for the site and infrastructure design of potable water, sanitary sewer and storm sewer systems, and for preparation of permitting plan packages, technical specifications. Supported cost estimates and ensured discipline coordination.
- This project was an industrial development to be located on undeveloped land owned by Caribbean Petroleum Refining in the Bayamon Municipality. The proposed project comprised the construction of buildings, warehouses and support office on approximately 66.023 acres.

### Senior Project Engineer | Buckeye Yabucoa Dredging Project | CSA Group

- Served in charge of the design of the new dikes and the staging area for the dredge barges material on shore.
- As an immediate solution, Buckeye required that approximately 100,000 cubic yards of sediments be dredged within a section of the navigational channel maintaining a depth of -40 (+1) feet (MLW) and a minimum width of the 375 feet, near the entrance to the turning basin. Dredge material is expected to be disposed on-shore /on-site (within dike areas), at an authorized landfill or other inland authorized disposal site.

## Employment History

**CSA Group**, Civil Engineer 1991-Present

## Education

- Master of Science, Civil Engineering Polytechnic University of Puerto Rico
- Bachelor of Science, Civil Engineering University of Puerto Rico

## Certifications

- Professional Engineer  
Puerto Rico License No. 11578  
New York License No. 96990-1
- Board Certified Environmental Engineer (BCEE): American Academy of Environmental Engineers, Certification in Water and Wastewater Engineering #04-10064
- College of Professional Engineers and Land Surveyors of Puerto Rico
- Arthur S. Bedell Award, Water Environment Federation, 2009  
Puerto Rico

## Relevant Training

- 30 hours Occupational Safety and Health Training Course in Construction Safety and Health
- USACE-Construction Quality Control Management for contractors
- FEMA: IS-1013 – Costing-Estimates and the Cost Estimating Format

## Professional Bio

Mr. Wilson Ortiz is a licensed professional engineer with 28 years of experience in consulting engineering, project management, and disaster recovery programs. He has performed work in project areas including design for water and wastewater infrastructure projects, sludge treatment process design, industrial and residential infrastructure projects, pollution prevention, and water quality analysis.

## Relevant Project Experience

### Program Management | New York City Office of Management and Budget (OMB) Hurricane Sandy Disaster Recovery Program Management Services | CSA Group

- Conducted field inspections of damages caused by Hurricane Sandy to NYC Department of Environmental Protection (DEP) Wastewater Treatment Plants (WWTP) and Pump Stations.
- Developed Adaptation Assessment Reports and cost estimates of the affected WWTP's to define eligibility for FEMA Hazard Mitigation Funding under Section 406 (Stafford Act).
- Worked directly with FEMA New York staff on validation of damages, assessments, project worksheet revisions, and other data.
- Performed conduit and wire inventory analysis for all NYC WWTPs. Provided restoration scopes of work to FEMA for approval. Provided WWTP/Pump Stations hazard mitigation recommendations within the NYC Wastewater Resiliency Plan. Review of Flood Vulnerability.

### Technical Leader | Puerto Rico Aqueduct and Sewer Authority (PRASA) Beatriz Reservoir | CSA Group

- Was responsible for developing the preliminary design for raw water line, dam, and transmission line, and in charge of the Preliminary Engineering Report for the new water treatment plant.
- The existing water supply for areas surrounding the Municipality of Caguas, Puerto Rico, fell short of demand for the region. This project was developed to increase supply including the construction of a 36-meter high by 450-meter long earthen dam and reservoir along Beatriz creek.

### Technical Leader | PRASA Water Capital Improvement Program | CSA Group

- Was in charge of the water and wastewater projects providing program management, engineering and design management, geographic information system (GIS), environmental compliance, land acquisition, construction management, start-up and commissioning.
- CSA was selected as the East Region Program Manager for PRASA's Capital Improvement Program (CIP). This is a \$700 million plus program with over 140 projects identified in the region.

## Employment History

**CSA Group**, Water Discipline Manager, 2006-Present

## Education

- Business Administration, National University of Technology, Argentina
- B.S. in Civil Engineering, National University, Rosario, Argentina

## Relevant Training

- FEMA: IS-00100.b, Introduction to Incident Command System, ICS-100
- FEMA: IS-00200.b, ICS for Single Resources and Initial Action Incident, ICS-200
- FEMA: IS-634, Introduction to FEMA's Public Assistance Program
- FEMA: IS-00700.a, National Incident Management System Introduction
- FEMA: IS-800.c – National Response Framework, An Intro
- FEMA: G-300, Intermediate Incident Command System for Expanding Incidents
- FEMA: IS-1013 – Costing- Estimates and the Cost Estimating Format
- CTQP Earthwork Construction Inspection, Level 1
- CTQP Earthwork Construction Inspection, Level 2
- CTQP Asphalt Paving Technician, Levels 1
- CTQP Asphalt Paving Technician, Levels 2
- CTQP Final Estimates, Level 1
- ACI Concrete Field Technician, Level 1
- Maintenance of Traffic (MOT), Intermediate Level Course No. BT-05-0078
- Primavera P6 Training

## Professional Bio

Mr. Luis Osella has more than 40 years of experience dedicated to engineering and construction management of infrastructure facilities projects, including buildings and roadways projects, drainage and water resources, industrial facilities, hospitals and correctional facilities. In his extensive professional career Mr. Osella has held a variety of management positions related to design and construction, from Project Superintendent, thru Design Engineer and Construction Project Manager, operations and maintenance, project control and construction inspection of civil, electrical and mechanical projects. His experience also includes participation in emergency recovery projects, ruled by FEMA.

## Relevant Project Experience

### Project Controller | Hurricane Irma / Debris Monitoring | CSA Group

- Served in charge of working with truck certifications, staff organization and data management and project controls.
- Provided monitoring services initially for contractor's working a force account basis and later monitored hangers and leaners cutting operations as well as debris hauling. Debris monitoring and reporting included over 400 schools affected by Hurricane Irma. Over 50 debris monitors, five prime contractors, 240+ trucks certified and over \$4 million in debris removal up to date. Field work related to recording the status of debris removal at various school locations in North Miami following Hurricane Irma.

### Program Manager | Florida Department of Transportation (FDOT) District 4 | CSA Group

- Responsible for the hiring and training of personnel specifically responsible for the debris removal operations and repairs to damaged infrastructure.
- Performed program management, inspection and construction management services for the Hurricane Recovery Program, work also included disaster assessment and combined recovery management. The program assisted FDOT District 4 with damages recovery suffered on Broward, Palm Beach, Indian River and Martin Counties.

### Project Administrator | Hurricane Charley, Frances and Jeanne / Hurricane Recovery Program FDOT District 1 | CSA Group

- Served as project administrator working with staff engineers for this project involving the disaster assessment and combined recovery management requiring a variety of engineering, construction management, inspections and debris removal for twelve counties in southwest and central Florida affected.

## Employment History

**CSA Group**, Senior Project Manager, 2001-Present

**Siryi, del Gerbo & Azanza C.A.**, Project and Design Manager, 1998–2001

**Samos de Construcciones C.A.**, Project Manager, 1983–1994

## Education

- Master of Science, Environmental Science, City University of New York
- Bachelor of Science, Biology, City University of New York

## Relevant Training

- FEMA Independent Study Courses 120, 235, 1013
- Project Management, National Environmental Protection Act Process

## Professional Bio

Mr. George Rupp has over 30 years of professional experience in which he has been responsible for managing dozens of contracts. He has prepared and reviewed dozens of environmental studies and more than 35 Environmental Impact Statements (EIS). As part of this work he has also managed several large programs for multi-task on-call contracts. In addition to his project experience he is also experienced in developing and reviewing contracts, cost estimates, technical scopes of work, preparing and reviewing invoices, developing project schedules, and managing staff and subconsultants. His project experience spans a variety of markets including energy, transit/transportation, military, higher education, laboratories, sports power, cultural, industrial, hospitals and healthcare facilities and large-scale planning initiatives.

## Relevant Project Experience

### Environmental Program Manager | New Jersey Transit Hurricane Sandy Corporation Post Recovery Program | BEM Systems

- Managed an on-call contract that provided environmental program management for Post Hurricane Sandy projects. Responsibilities included project coordination and integration with design and planning, NEPA, permitting, compliance and data management/control.
- Reviewed work scopes, price proposals and performed cost analysis; reviewed subconsultant contracts and invoices. Approximately 100 projects were slated as part of NJ TRANSIT's post-storm effort which included repair and resiliency modifications to stations, substations, maintenance, dredging and canal redevelopment, rail yards, switch, signal, interlocking, and others.
- Performed technical work including development of a computer interface and data management software for the construction management team to assist with development and handling of documentation for NEPA, state and local permitting. The following two examples were projects within the program:
- Gladstone Branch Poles Replacement Project – This project involved the replacement of 560 catenary poles along the Gladstone Branch from Summit to Peapack-Gladstone. Completed documentation for a Categorical Exclusion under NEPA including an evaluation of endangered species, cultural resources, wetlands, parks and recreation facilities, socioeconomics and environmental justice, air quality, noise and scenic resources.
- County Yard Project – Prepared a Categorical Exclusion under NEPA including an evaluation of cultural resources, wetlands, parks and recreation facilities, socioeconomics, air quality, and noise for a new maintenance shop, storage tracks and a future new station stop at Jersey Avenue in New Brunswick.
- Substations Project – This project involved providing recovery and resiliency for critical substations that received significant damage from Superstorm Sandy in Hoboken Terminal and yard, Meadows Maintenance Complex, and Bay Head Yard.

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## **Project Manager, Cost Reasonableness | New York State Governor's Office of Storm Recovery Program Management Hurricane Sandy, Hurricane Irene, and Tropical Storm Lee Recovery | CSA Group**

- As part of the Program Management Team, was responsible for the preparation of Independent Cost Estimates and Cost Reasonableness reviews for architectural, engineering and construction management services for US Housing and Urban Development (HUD) Community Development Block Grant Disaster Recovery (CDBG-DR)-funded Infrastructure and Community Reconstruction projects.

## **Project Manager, Permitting | New York City (NYC) Department of Design and Construction (DDC) Design-Build for Hurricane Sandy Affected Areas | CSA Group**

- Performed environmental management for the project for construction management, design, build, reconstruction rehabilitation, and replacement of approximately 700 homes in Staten Island and Queens.
- Managed all environmental and other permits for this project. Worked with the NYC Department of Buildings, The Landmarks Preservation Commission, Department of Environmental Protection, Board of Standards and Appeals, and New York Dept. of Environmental Conservation, and others.

## **Project Manager, Permitting | Florida East Coast Industries, Inc., Passenger Rail Feasibility Study | Louis Berger Group**

- Completed an analysis of comparable rail projects within the United States. Research was completed on ridership projections and growth, revenue projections and growth, stations, distance, travel time, intermodal connections, proximity to airports, and proximity to major roads. Comparisons were made to alternate travel mode cost, time and convenience. The lines evaluated were the Pacific Surf-liner, the Keystone Corridor, the Downeaster, the Capitol Corridor, the Hiawatha, the Lynchburg/Washington DC spur, the Newport News to Washington DC spur and the Piedmont Line.

## **Program Manager, Permitting | Dormitory Authority of the State of New York (DASNY) Contract | Louis Berger Group**

- Prepared Environmental Assessment's and supplemental reports for this project.
- Provided program management for consecutive on-call contracts with 60 projects developed under New York State's rigorous environmental review and NEPA requirements. Projects included multiple large laboratory/research facilities, multiple hospital and healthcare facilities, multiple several educational facilities, several community facilities, multiple student residence facilities, a museum and an athletic facility. There have been approximately 60 assignments statewide on these two contracts over a period of ten years. Many technical areas were assessed including air emissions, noise, traffic, hazardous materials, waste generation/control, land use, etc.

## **Environmental Specialist | Pulp Mill and Power Island, Latvia | BE&K, Inc**

- Completed a preliminary draft environmental impact assessment for a major pulp mill proposed for construction in eastern Latvia. Work included evaluation of wetlands, drainage, wastewater, air emissions, ecology and endangered species, transport, noise, material storage, use of raw materials, regulatory review, solid waste, and hazardous waste.

## **Employment History**

**CSA Group**, Program Manager / Environmental, 2014-Present

**BEM Systems**, Program Manager 2013-2014

**The Louis Berger Group, Inc.**, Director of Environmental Planning, 2000-2012

**BE&K, Inc. / Terranext**, Director of Environmental Assessment, 1992-2000

**Ethan C. Eldon Associates, Inc**, Senior Project Manager, 1985-1992

## Education

- Master of Science, Construction Management, New York University
- Bachelor of Business Administration, American Intercontinental University

## Certifications

- Professional Engineer: NY #090814 CT #31829
- Certified Construction Manager (CCM)
- 10 Hour OSHA Training for Safety Practices in Construction
- NYC DOB 4-HR Supported Scaffold Certificate
- American Concrete Institute- Field Technician Inspector
- ICC - Structural Masonry Special Inspector
- ICC - Structural Steel Bolting Special Inspector
- ICC - Fireproofing Special Inspector
- FEMA: IS-1013 – Costing- Estimates and the Cost Estimating Format  
FEMA: IS-100, IS-200

## Relevant Highlights

- Decades of experience in engineering
- Decades of experience overseeing complex public sector contracts and projects

## Professional Bio

Mr. Jesus “JJ” Suarez has held various leadership positions in program management positions across all CSA Group divisions for over 15 years. He has worked successfully on programs leading staff in program management roles requiring extensive expertise in preconstruction, budget and schedule. These responsibilities include planning, developing, and coordinating project control support services to assist project and program managers and marketing staff across all CSA Group divisions. His responsibilities include engaging and supporting diverse clients and teaming arrangements on projects and programs of all sizes, performing and monitoring project controls support services, corporate wide national and international coordination of proposals, and enterprise wide administration and organizational support for project controls tools. His expertise includes developing and maintaining project control systems, assisting with improvement initiatives, and providing support and training to project and program managers to improve project controls system implementation and integration.

## Relevant Project Experience

### Deputy Program Manager | New York City Housing Authority Hurricane Sandy Resiliency & Renewal Long Term Repair Program | CSA Group

- Supported the Office of Recovery and Resilience for New York City Housing Authority (NYCHA) including assembling project management solicitation documents and reviewing for quality and regulatory compliance, coordination of bid advertisement, and assisting NYCHA personnel in the selection process.
- Performed contract administration for project management contracts and assisting with accounts payable function to validate and process vendor pay certifications, regulatory requirements, and vendor account budget tracking/accounting.
- Performed projects including reconstruction and/or relocation of boiler rooms, electric meter rooms and other mechanical systems; standby generators; structural and restoration repair work in apartments, common areas, and community spaces; site restoration work; and various flood panel and flood proofing systems to prevent future storm related damage due to floods at the 219 buildings located in 33 NYCHA developments.
- Estimated construction cost associated with this program was \$3 billion. The projects associated with this program are supplemented by a Job Order Contract program which is utilized to perform as needed repairs and small capital projects necessary to provide uninterrupted services to NYCHA residents as the program progresses.

### Project Coordinator | Cincinnati, Ohio, Public Schools Program Management | CSA Group

- Coordinated with multiple construction managers to track budgeted cost and schedule data against actuals for simultaneous school construction projects.



- 
- Tracked and routed applications for change orders submitted by multiple consultants and was directly responsible for the creation of monthly cost and progress reports presented to the Cincinnati Public School Board.

## Employment History

**CSA Group**, CEO, 1992-Present

**Belcan Engineering**, President, 1986-1995

**Structural Dynamics Research Corporation**, Senior Engineering Manager, 1976-1986

## Education

- Master of Engineering, Construction Management, University of Florida
- Bachelor of Science, Civil Engineering, University of Florida

## Relevant Certifications

- Professional Engineer – State of Florida License No. 57607

## Relevant Highlights

- Experience in construction design
- Experience in contract administration

## Professional Bio

Ms. Elizabeth Moore is a highly skilled emergency management engineer. Upon graduation from the University of Florida with a degree in Civil Engineering, Ms. Moore began her career as the City Engineer for the City of Callaway. She then returned to the University of Florida for her master's degree in Construction Management. From 1998 through 2004, Mrs. Moore she managed multiple civil engineering projects. In 2001 Ms. Moore obtained her Florida Professional Engineering License (PE #57607). In 2015, Mrs. Moore co-founded Anchor CEI, Inc. Mrs. Moore's diverse experience includes minor roadway design, utility design, regulatory permitting, traffic analysis, stormwater system design/master planning, water and wastewater design, master planning, grant writing construction administration, and engineering services during construction/inspection services.

## Relevant Project Experience

### **Project Manager /Sports Park and Stadium Complex at Breakfast Point | ACEI, Inc.**

- Designated oversight, value engineering, design, procurement, and general project management for a multi-million dollar project.

### **Project Manager /Bayside Subdivision CEI Services | ACEI, Inc**

- Performed contract administration and inspection of improvements to the water, wastewater and roadway systems within the subdivision.
- Coordination with multiple governmental agencies, general public, and companies.

### **Project Manager /United States Department of Agriculture (USDA) Water Improvements Project | Preble-Rish, Inc.**

- Coordination for the installation and replacement of more than 48,000 linear feet (LF) of water mains in the City's existing system.
- Designed and oversaw construction of a new booster station and maintenance building. The funding included American Recovery Act funds which required adherence to the Davis Bacon Wage Rates.

## Employment History

**Anchor Consulting Engineering and Inspection, Inc., Vice President, 2015-Present**

**Preble-Rish, Inc., Regional Manager, 2000-2015**

**Baskerville-Donovan, Inc., 1998-2004**

**City of Callaway, 1995-1997**

## Education

- Bachelor of Science, Biosystems Engineering , Auburn University

## Certifications

- Professional Engineer – State of Florida License No. 80762
- Professional Engineer – State of Alabama License No. 3566

## Relevant Experience

- Project Management
- Utility Design
- Traffic Analysis
- Master Planning
- Roadway Inspections
- Site Design
- Wastewater design

## Professional Bio

Ms. Brittany Trumbull is a skilled engineer with a diverse array of experiences. Upon graduation from the Auburn University with a degree in Biosystems Engineering, Ms. Trumbull began her career as a project engineer where she managed multiple civil engineering projects. She has taken part in projects focusing on minor roadway design, sidewalk design, utility design, site design, regulatory permitting, traffic analysis, and stormwater system design/master planning. She has also had experience with water and wastewater design, master planning, grant writing construction administration, and engineering services during construction/inspection services. Additionally, Ms. Trumbull is a co-founder of Anchor CEI, Inc.

## Relevant Project Experience

### Project Manager /Sports Park and Stadium Complex at Breakfast Point | ACEI, Inc.

- Designated oversight, value engineering, design, procurement, and general project management for a multi-million dollar project.

### Project Manager /Shadeville Road Improvements | ACEI, Inc

- Oversaw inspection and construction administration of approximately 6.27 miles and 3.2 miles of roadway improvements. The improvements included milling, paving, minor drainage improvements, driveway replacements, earthwork, signing and striping.
- Responsible for minor re-design of the project during construction.

### Project Manager /Fanning Bayou Water Booster Plant | Preble-Rish, Inc.

- Coordinated the design of a water booster plant near the Fanning Bayou Booster Plant. The plant included four 1,200 gallons per minute (gpm) pumps, a 300,000-gallon storage tank, control building, site piping, and all necessary appurtenances.

## Employment History

**Anchor Consulting Engineering and Inspection, Inc., Vice President, 2015-Present**

**Preble-Rish, Inc., Project Manager, 2009-2015**

# Bid Proposal Form

---

**BID PROPOSAL FORM**

To: The City of Key West  
Address: 1300 White Street, Key West, Florida 33040  
Project Title: Emergency Management Consulting Services

Bidder's contact person for additional information on this Proposal:

Company Name: Hagerty Consulting, Inc.

Contact Name & Telephone #: Katie Freeman; 847-492-8454 x119

Email Address: katie.freeman@hagertyconsulting.com

**BIDDER'S DECLARATION AND UNDERSTANDING**

The undersigned, hereinafter called the Bidder, declares that the only persons or parties interested in this Proposal are those named herein, that this Proposal is, in all respects, fair and without fraud, that it is made without collusion with any official of the Owner, and that the Proposal is made without any connection or collusion with any person submitting another Proposal on this Contract.

The Bidder further declares that he has carefully examined the Contract Documents for the construction of the project, that he has personally inspected the site, that he has satisfied himself as to the quantities involved, including materials and equipment, and conditions of work involved, including the fact that the description of the quantities of work and materials, as included herein, is brief and is intended only to indicate the general nature of the work and to identify the said quantities with the detailed requirements of the Contract Documents, and that this Proposal is made according to the provisions and under the terms of the Contract Documents, which Documents are hereby made a part of this Proposal.

**CONTRACT EXECUTION AND BONDS**

The Bidder agrees that if this Proposal is accepted, he will, within 10 days, not including Saturdays and legal holidays, after Notice of Award, sign the Contract in the form annexed hereto and will provide evidence of holding required licenses and certificates as indicated in the Contract Documents.

CERTIFICATES OF INSURANCE

Bidder agrees to furnish the Owner, before commencing the work under this Contract, the certificates of insurance as specified in these Documents.

ADDENDA

The Bidder hereby acknowledges that he has received Addenda No's. 1, \_\_\_\_\_,  
\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_,

(Bidder shall insert No. of each Addendum received) and agrees that all addenda issued are hereby made part of the Contract Documents, and the Bidder further agrees that his Proposal(s) includes all impacts resulting from said addenda.

SALES AND USE TAXES

The Bidder agrees that all federal, state, and local sales and use taxes are included in the stated bid prices for the work.

SURETY

Hays Companies \_\_\_\_\_ whose address is

1200 N. Mayfair Rd. Suite #100 \_\_\_\_\_, Milwaukee \_\_\_\_\_, WI \_\_\_\_\_, 53226 \_\_\_\_\_

Street City State Zip

BIDDER

The name of the Bidder submitting this Proposal is Hagerty Consulting, Inc. \_\_\_\_\_

\_\_\_\_\_ doing business at

1618 Orrington Avenue, Suite 201 \_\_\_\_\_, Evanston \_\_\_\_\_, IL \_\_\_\_\_, 60201 \_\_\_\_\_

Street City State Zip

which is the address to which all communications concerned with this Proposal and with the Contract shall be sent.

The names of the principal officers of the corporation submitting this Proposal, or of the partnership, or of all persons interested in this Proposal as principals are as follows:

Stephen H. Hagerty \_\_\_\_\_

Bradley R. Grining \_\_\_\_\_

Lisa Altenbernd \_\_\_\_\_

\_\_\_\_\_

If Sole Proprietor or Partnership

IN WITNESS hereto the undersigned has set his (its) hand this \_\_\_\_\_ day of \_\_\_\_\_ 2017.

\_\_\_\_\_  
Signature of Bidder

\_\_\_\_\_  
Title

If Corporation

IN WITNESS WHEREOF the undersigned corporation has caused this instrument to be executed and its seal affixed by its duly authorized officers this 17th day of December 2019

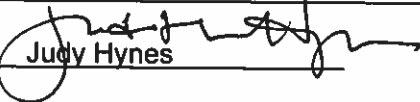
(SEAL)

Hagerty Consulting, Inc.

Name of Corporation

By   
Katie Freeman

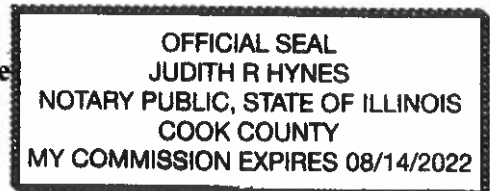
Title Director of Operations

Attest   
Judy Hynes

Sworn and subscribed before this 17th day of December, 2019

NOTARY PUBLIC, State of Illinois, at Large

My Commission Expires: August 14, 2022



# Attachment A – Unit Price Proposal Form

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## ATTACHMENT – A

### UNIT PRICE PROPOSAL FORM

Proposal costs are inclusive of all related expenses including, but not limited to, contract administration, technical assistance to the City, personnel training and certification, TDMS management, services for security, safety, and associated actions necessary for implementation of emergency management operations by the Proposer as defined in the Contract.

PROPOSAL FROM:

Company: Hagerty Consulting, Inc.

Address: 1618 Orrington Avenue, Suite 201 Evanston, IL 60201

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Phone/ Fax: 847-492-8454 / 847-859-1710

To furnish all materials, equipment and labor and to perform all work in accordance with the Contract Documents for: **As-Needed Emergency Management Services**, located within CITY OF KEY WEST, Florida.

To: *CITY OF KEY WEST*

*ATTN: CITY CLERK*

*1300 White St.*

*Key West, FL 33040*

- 1.0 The undersigned Proposer proposes and agrees, if this Proposal is accepted, to enter into a Contract with CITY in substantially the form as the Contract included in the Proposal

Documents to perform all Work and any Additional Services as specified or indicated in the Proposal Documents at the unit prices and within the times indicated in this Proposal and in accordance with the other terms and conditions of the Proposal Documents.

2.0 Proposer accepts all of the terms and conditions of the Invitation to Proposal and Instructions to Proposers, including without limitation those dealing with the disposition of Proposal security. The Proposal will remain subject to acceptance for 90 days after the Proposal opening, or for such longer period of time that Proposer may agree to in writing upon request of CITY.

3.0 In submitting this Proposal, Proposer represents, as set forth in the Contract, that:

A. Proposer has examined and carefully studied the Proposal Documents, the other related data identified in the Proposal Documents, and the following Addenda, receipt of all, which is hereby acknowledged;

Addendum No.	Addendum Date
<u>1</u>	<u>12/10/19</u>
<u>                    </u>	<u>                    </u>
<u>                    </u>	<u>                    </u>

B. Proposer has had an opportunity to visit the Site and become familiar with and is satisfied as to the general, local and Site conditions that may affect cost, progress, and performance of the Work;

C. Proposer is familiar with and is satisfied as to all federal, state and local Laws and Regulations that may affect cost, progress and performance of the Work;

E. Proposer has given the City written notice of all conflicts, errors, ambiguities, or discrepancies that Proposer has discovered in the Proposal Documents, and the written resolution thereof by the City is acceptable to Proposer;

F. The Proposal Documents are generally sufficient to indicate and convey

understanding of all terms and conditions for the performance of the Work for which this Proposal is submitted.

- 4.0 Proposer further represents that this Proposal is genuine and not made in the interest of or on behalf of any undisclosed individual or entity and is not submitted in conformity with any agreement or rules of any group, association, organization or corporation; Proposer has not directly or indirectly induced or solicited any other Proposer to submit a false Proposal; Proposer has not solicited or induced any individual or entity to refrain from Proposal; and Proposer has not sought by collusion to obtain for itself any advantage over any other Proposer or over City.
  
- 5.0 Proposer acknowledges that there are no quantities guaranteed, and Unit Cost information is solely for the purpose of comparison of Proposals, and final payment for all Unit Price Proposal items will be based on actual services provided, determined as provided in the Contract Documents.
  
- 6.0 Proposer acknowledges that all unit costs include any necessary insurance and bonds.

In accordance with the instructions in Addendum 1, Hagerty has populated the pricing form located in the Draft Contract as Exhibit B rather than the pricing form presented in the original Attachment A.

**Table A – UNIT PRICING**

## **Exhibit “B”**

### **Level 2 Support:**

#### **Stand-by Incident Management Support Team Activation**

In the event that a disaster escalates to a proportion where it exhausts certain City resources up to and including incident management and EOC support personnel, CONSULTANT can provide Incident Management Support Teams (IMSTs) to support and augment staffing at the Local/City/County/State Emergency Operations Center (EOC), to include but not limited to Incident Managers, Command, Operations, Logistics, Planning and Finance/Adm. Sections and other ICS/EOC unit level personnel. This service allows local jurisdictions to maintain continuity of government while effectively managing the incident.

In addition, through the Federal Emergency Management Agency's (FEMA) Public Assistance (PA) Grant Program, FEMA provides supplemental Federal disaster grant assistance for debris removal, emergency protective measures, and the repair, replacement, or restoration of disaster-damaged, publicly owned facilities and the facilities of certain Private Non-Profit (PNP) organizations. The PA Program also encourages protection of these damaged facilities from future events by providing assistance for hazard mitigation measures during the recovery process.

CONSULTANT can provide short-term and long-term recovery staff support to assist the City with the FEMA Public Assistance (PA) Grant Program to provide assistance to the City so that you can quickly respond to and recover from major disasters or emergencies declared by the President.

#### **NOTE:**

1. The initial response team will vary in number of staff based on the scope of each event. Typically, a two-person team will respond to evaluate the situation status (Phase 1). Staffing will then ramp up to address immediate needs and, should an event escalate to significant additional services proportions, CONSULTANT will have pre-staged staffing on standby for immediate response (Phase 2).
2. CONSULTANT provides the IMST and FEMA-related services on a time-and-expense basis. The overall cost of our service will be based on the number of staff and time required. Per-project amounts will be calculated according to the following time-and-expense rate table.
3. CONSULTANT reserves the right to remove all CONSULTANT staff in harm's way if an event is deemed unsafe due to improper sheltering or as conditions warrant in order to provide and protect the safety of their staff.
4. Activation fees are eligible for reimbursement, if the City is included in a declared disaster by a Presidential declaration.
5. Because of the nature of federal reimbursable funding, EA can make no guarantees concerning the amount of funding the City will receive from applicable funding sources. EA's fees for service are not contingent on FEMA or other reimbursements to the City.

**Fee Schedule Level 2 Support: TO BE PROPOSED BY CONSULTANT**

Position	Rate/Hour
<b>Emergency Management</b>	
Senior EM CONSULTANT	\$ 225
EM CONSULTANT	\$ 185
Senior Planner	\$ 155
Project Manager	\$ 165
Planner	\$ 135
<b>Incident Management Team Support (Level 2)</b>	
<b>[PHASE 1]</b> Initial On-site Incident Management Support Team Activation (IMST) Fee	\$ 4080 Plus expenses, per 24 hr. day
<b>[PHASE 2]</b> Emergency Management Coordinator <i>(IMST Overhead Teams; Team Leader)</i>	\$ 155
Operations Manager <i>(Any IMST Command or General Staff position)</i>	\$ 135
Operations Specialist <i>(Any non- general/command IMST position)</i>	\$ 110
<b>Hazard Mitigation Assistance</b>	
Senior Program Manager	\$ 225
Program Manager	\$ 205
Technical Specialist	\$ 185
Administrative Support	\$ 85
<b>Preliminary Damage Assessment – Public Assistance</b>	
Damage Assessment Team Lead	\$ 165
Damage Assessment Specialist (Team)	\$ 145
<b>Public Assistance Consulting</b>	
Senior CONSULTANT / Appeals Specialist	\$ 205
CONSULTANT	\$ 185
Technical Specialist I	\$ 165
Technical Specialist II	\$ 145

*Note: The Activation fee is based on the following:*

**On-site Incident Management Support Team (IMST)**

**Note:** The Activation fee is based on the following onsite Activation, when requested by the City /City Manager and/or OEM to report to the Emergency Operation Center or other designated location.

- *Onsite Activation: The Activation Fee Schedule is executed when requested by the City Manager and/or OEM and followed with a written "Notice to Proceed" to report to the Emergency Operation Center or other applicable location. Partial days are billed at 12 hour increments.*
- *Initial IMST Response Team will vary in number of staff based on the scope of each event. Typically a two (2) person team will respond for phase 1 to evaluate situation status and resource need. Phase 2, staffing will ramp up to address immediate needs and should an event escalate to significant proportions, CONSULTANT will have pre-staged staffing on standby for immediate response. Phase 2 pricing shall be negotiated and determined based the approved fee schedule and on scope of services at time of request.*
- *Activation (Emergency Management) fees are eligible for reimbursement if the Governing Agency is included in a declared disaster by a Presidential Declaration. The amount of the recovery may vary depending on the disaster eligibility of Federal, State, and local match for the event. (i.e.: In a hurricane activation: 100% recovery for Emergency Protective Measures for initial 72 hours response, 75% Federal / 25% (divided by local and state) for other disaster recovery operations).*
- *Phase 2 Response Fees: Professional fees will be invoiced on a monthly basis. Expenses will be billed to the City at EA's cost. Expense reimbursement will include transportation, lodging, meals and incidentals. EA will make every effort to keep expenses to a minimum. We encourage the City to assist us with this by any means available. To simplify billings, we are agreeable (and prefer) to establishing per diems that are agreeable to the both the City and our team as long as they accurately reflect the current economic conditions.*

**Confirmation of Signature of Unit Price Proposal Information**

Hagerty Consulting, Inc.  
Name of Proposer

  
Signature of Proposer

Katie Freeman, Director of Operations  
Title

# Attachment B – Proposer’s General Operation Plan

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## ATTACHMENT – B

### PROPOSER'S GENERAL OPERATION PLAN

Detailed descriptions of how the Proposer would plan, organize, initiate, and evaluate:

- Annual reviews of the City's CEMP and Hazard Annex review, and associated emergency response and contingency plans

Please see our response in the technical proposal.

- City associate emergency management training

Please see our response in the technical proposal.



# Attachment C – Proposer’s Qualifications

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## ATTACHMENT – C

### Proposer's Qualifications Statement Form

The undersigned guarantees the truth and accuracy of all statements and the answers contained herein.

1. Please describe your company in detail.

Hagerty Consulting, Inc. is a comprehensive emergency management firm assisting clients with planning, training,

exercises, hazard mitigation, and federal grant management across a wide range of subject areas.

2. The address of the principal place of business is:

1618 Orrington Avenue, Suite 201 Evanston, IL 60201

3. Company telephone number, fax number and e-mail addresses:

Telephone: 847-492-8454 Fax: 847-859-1710

E-mail: [development@hagertyconsulting.com](mailto:development@hagertyconsulting.com)

4. Number of employees:

Hagerty employs approximately 125 full-time professionals and can draw from our cadre of 1,000 independent contractors.

5. Number of employees or subcontractors to be assigned to this project (per event) and what is capacity?

Hagerty has proposed a flexible staffing plan able to meet the needs of the City depending on the

nature of the event. Please see the response in our technical proposal.

---

6. Company Identification numbers for the Internal Revenue Service:

Hagerty's Federal Employer Identification Number is 37-1431085.

---

7. Provide Occupational License Number (and County), if applicable, and expiration date:

N/A

---

8. How many years has your organization been in business? Does your organization have a specialty?

Hagerty has been in business for 18 years. Hagerty's specialty is helping clients prepare for,

respond to, and recover from disasters.

---

9. What is the last project of this nature or magnitude that you have completed?

Please provide project description, reference and cost of work completed.

See attached sheet

---

---

10. Have you ever failed to complete any work awarded to you? If so, where and why?

No.

---

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11. Give names, addresses and telephone numbers of three individuals, corporations, agencies, or institutions for which you have previously performed work. List of ALL disaster response contracts performed in the last 5 years, including customer name, total contract amount and yards removed. Use a separate tab if necessary.

- **Name** Calvin Johnson, Assistant Director, CDBG-DR, New York City Office of Management and Budget

**Address** 255 Greenwich Street 6th Floor, New York, NY 10007

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**Telephone No.** 212-788-6024

- **Name** Jennifer Aldridge, Disaster Recovery Project Manager, City of Panama City, FL

**Address** 501 Harrison Avenue, Panama City, FL 32401

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**Telephone No.** 850-872-3004

- **Name** Lee Walters, Director of Facilities, Bay District Schools

Address 1311 Balboa Avenue, Panama City, FL 32401

Telephone No. 850-814-9786

• Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone No. \_\_\_\_\_

12. List the following information concerning all contracts in progress as of the date of submission of this proposal. (In event of co-venture, list the information for all co-ventures.)

**Table B-1: In Progress Contracts**

Name of Project	Owner	Value	Contracted Completion Date	% of Completion to Date
See insert sheet				

*(Continue list on insert sheet, if necessary.)*

13. Has the Proposer or Representative inspected the proposed project site and does the Proposer or Representative have a complete plan for performance of disaster response services?

No, Hagerty has not inspected the proposed project site. Yes, Hagerty has a complete plan for

performance of disaster response services.

---

14. Provide list of subcontractor(s), the work to be performed and also a list of major materials suppliers for this Project?

**Table B-2: Subcontractors**

<b>Sub Contractor Name</b>	<b>Address</b>	<b>Work to be Performed</b>
Please see insert sheet.		

*(Continue list on insert sheet, if necessary)*

*The foregoing list of subcontractor(s) may not be amended after award of the contract without the prior written approval of the City Manager.*

15. What equipment do you own that is available for the work?

PROVIDE LIST IN ATTACHMENT E

Please see our response in Attachment E.

16. What equipment will you purchase for the proposed work?

*(Continue list on insert sheet, if necessary)*

Hagerty will purchase office equipment or any other materials as necessary to conduct the proposed work.

---

18. What equipment will you rent for the proposed work?

*(Continue list on insert sheet, if necessary)*

Hagerty does not intend to rent any equipment.

---

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19. State the names of the proposed project team and include resumes, and give details of his or her qualifications and experience in managing similar work.

*(Continue list on insert sheet, if necessary)*

See names and qualifications of our proposed project team in the technical proposal, and please

---

refer to resumes attached in Appendix 1.

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20. State the true, exact, correct and complete name of the partnership, corporation or trade name under which you do business and the address of the place of business. (If a corporation, state the name of the president and secretary. If a partnership, state the names of all partners. If a trade name, state the names of the individuals who do business under the trade name.)

Hagerty Consulting, Inc. Our President is Stephen H. Hagerty. Our Secretary is Lisa Altenbernd.

---

Our principal place of business is located at 1618 Orrington Avenue, Suite 201 Evanston, IL 60201

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- 20.1 The correct name of the bidder is:

Hagerty Consulting, Inc.

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- 20.2. The business is a (Sole Proprietorship) (Partnership) (Corporation).

Corporation.

---

20.3 The names of the corporate officers, or partners, or individuals doing business under a trade name, are as follows:

Stephen H. Hagerty, Lisa Altenbernd, Bradley R. Grining

SUBMITTED BY:

*Katie Freeman*

Katie Freeman, Director of Operations

SIGNATURE

PRINT NAME/ TITLE

STATE OF ILLINOIS )

) SS.

COUNTY OF Cook )

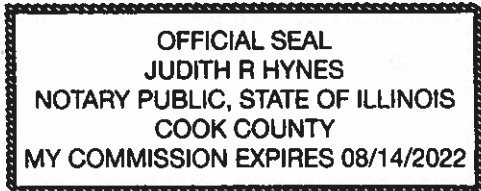
The foregoing instrument was acknowledged before me this 17<sup>th</sup> day of December,

2019, by Katie Freeman who is personally known to me or who has

produced \_\_\_\_\_ as identification and who did/did not take an oath.

WITNESS my hand and official seal, this 17<sup>th</sup> day of December, 2019.

(NOTARY SEAL)



*Judith R Hynes*  
(Signature of person taking acknowledgment)



## 9. Hagerty's Most Recent Project Completed

Hagerty most recently completed similar project is described below:

### Town of Surfside Beach, South Carolina Pier Replacement

<b>Agency Name</b>	Surfside Beach Public Works Department
<b>Agency Address</b>	115 U.S. Highway 17 North, Surfside Beach, SC 29575
<b>Point of Contact Name and Title</b>	John Adair, Director of Public Works
<b>Client Contact Information (telephone and email)</b>	843-913-6111, <a href="mailto:jadair@surfsidebeach.org">jadair@surfsidebeach.org</a>
<b>Cost of Work</b>	\$125,000
<b>Type of Services Provided</b>	FEMA Grant Management, Damage Assessment, Recovery Program Management

The Town of Surfside Beach (the Town) contracted Hagerty to perform a suite of program, project, and grant management services specific to a single major project damaged by Hurricane Matthew. The Town Fishing Pier was destroyed by Hurricane Matthew. Despite this, FEMA originally only offered the Town a grant of \$92,000 to repair the pier. The Town hired Hagerty to help support the development of a comprehensive and accurate grant application, and strategically manage PA program funding options and their procurement, design, construction, and closeout processes.

Hagerty has successfully increased the total eligible grant amount from \$92,000 to \$9.975 million. We were able to accomplish this significant increase through the following practices, all supported by FEMA PA policy:

- » Identify complete and accurate damages as a direct result of the incident;
- » Identify comprehensive and complete scope of work to repair these damages;
- » Develop an accurate and justifiable cost estimate to complete the eligible scope of work;
- » Prove that the Pier is eligible for full replacement under FEMA's 50 percent Rule; and
- » Identify eligible Hazard Mitigation measures through FEMA's 428 PA Alternative PAAP

This last accomplishment is the most important. As far as we are aware, this is the first time FEMA has approved hazard mitigation funding for a replacement project. We supported the Town through FEMA's eligibility determination process on this issue including top level meetings with FEMA Region IV management as well as FEMA headquarters (HQ) management. This was justified through a Benefit Cost Analysis (BCA) which yielded a Benefit Cost Ratio (BCR) of 2.01 (1.0 is acceptable by FEMA standards), a FEMA 428 PAAP policy citation, related precedent references, as well as Sea Level Rise (SLR) storm recurrence evidence.

The return on investment for the Town of Surfside is clear: The increased FEMA PA funding totals about \$9.88 million, and Hagerty's fee totaled \$125,000, which is roughly a 7,800 percent return on investment. Additionally, the entirety of Hagerty's fee will be funded by direct administrative cost reimbursements provided to FEMA as a part of the final PW.

## 11. List of Disaster Response Contracts Performed in the Last Five Years

The following presents a list of Hagerty's disaster response contracts performed in the past five years.

<b>Name of Project</b>	<b>Owner</b>	<b>Value</b>	<b>Dates</b>
<b>Disaster Recovery Compliance</b>	Colorado Department of Local Affairs	\$349,450	Feb. 2017-June 2019
<b>Long-Term Recovery Support</b>	California Governor's Office of Emergency Services	\$14,500,000	Nov. 2018-Nov. 2019
<b>CDBG Support</b>	City of Longmont, CO	\$2,900,000	June 2014 to Dec. 2019
<b>Recovery Operations</b>	City of New Orleans, LA	\$900,000	Mar. 2008 to Mar. 2013
<b>Sheltering Response</b>	Massachusetts Emergency Management Agency	TBD	Sept. 2018-Dec. 2018
<b>Harvey AAR</b>	City of Austin, TX	\$25,000	Nov. 2017-Apr. 2018
<b>Disaster Recovery Support</b>	City of Santa Cruz, CA	\$10,000	June-July 2017
<b>Recovery Support</b>	Brantley County, GA	\$145,000	Oct. 2016-Oct. 2017
<b>Pre- and Post-Disaster Recovery Services</b>	Georgia Emergency Management Agency	TBD	Aug. 2016-June 2018
<b>Emergency Management Services</b>	Ramsey County, MN	TBD	July 2016-July 2019
<b>Preparedness, Mitigation, Response, and Recovery Services</b>	Houston-Galveston Area Council of Governments, TX	TBD	Nov. 2015-Dec. 2016
<b>Planning Support</b>	Bay Area Urban Area Security Initiative (UASI), CA	\$1,000,000	Nov. 2015-Nov. 2017
<b>PA and HMGP Recovery Support</b>	Port Authority of NY and NJ	TBD	Aug. 2014-Dec. 2017
<b>Hurricane Sandy Recovery Support</b>	State of New Jersey	TBD	June 2013-June 2015
<b>Pre- and Post-Disaster Emergency Support</b>	Rhode Island Emergency Management Agency (RIEMA)	TBD	July 2012-July 2017
<b>Nationwide Infrastructure Support Technical Assistance Consultants (NISTAC) PA Technical Assistance</b>	FEMA Disaster Assistance Directorate (DAD)	\$45,000,000	June 2012-Jan. 2019
<b>Individual Assistance Standby Support</b>	State of South Carolina Emergency Management Division	TBD	May 2011-May 2016
<b>FEMA Program Coordination and Planning Support</b>	FEMA DAD	\$4,500,000	Aug. 2009-Feb. 2015
<b>FEMA IA TAC</b>	FEMA Regions I, II, V	TBD	May 2009-Nov. 2015

## 12. Table B-1: In Progress Contracts

Please see Hagerty's response below:

Name of Project	Owner	Value	Contracted Completion Date	Percentage Complete
CDBG-DR Prime Grant Management Services	State of California	To be determined	12/3/2020	5
Argonne National Laboratory Outcome Driven Recovery Program Executive Office	Argonne National Laboratory	\$577,014	9/30/2020	10
Montgomery County Flood Mitigation Assistance Application Development for Tropical Storm Imelda	Montgomery County, TX	\$59,800	1/31/2020	10
Montgomery County Tropical Storm Imelda Disaster Site Safety Assessments	Montgomery County, TX	\$375,000	7/31/2020	15
Protestant Memorial Medical Center HOPE Coalition Exercise Support	Barnes-Jewish Hospital	\$49,986	5/31/2020	25
Royal Palm Companies Grants Management Support - Grand Reserve	Royal Palm Companies	\$127,182	6/30/2020	30
NYCEM Surge Staffing Advisory Support	City of New York, NY Emergency Management Department	\$65,000	10/2/2024	5
NYCEM Surge Staffing Readiness Support	City of New York, NY Emergency Management Department	\$85,000	10/2/2024	5
Girls, Inc of Bay County Disaster Recovery Administrative Services	Girls, Inc.	\$150,000	10/1/2021	25
Federal Emergency Management Agency Field Operations Directorate FQS Curriculum Development	FEMA	\$899,721	9/30/2020	25
Montgomery County Imelda Debris Monitoring	Montgomery County, TX	\$750,000	11/22/2019	90
CCPRS FEMA CDL, Various Active Disasters	FEMA	\$899,067	2/4/2020	20
Horry County Hurricane Dorian Recovery Support	Horry County, SC	\$100,000	10/30/2020	25
Feeding America Guide and Toolkit Development Support	Feeding America	\$24,827	12/31/2019	85
State of Nebraska Long-Term Recovery Planning	State of Nebraska	\$489,580	9/8/2020	25
URW Fall 2019 Crisis Management Team Exercise	Westfield Corporation	\$31,850	12/31/2019	90
URW Fall 2019 World Trade Center Exercise	Westfield Corporation	\$29,600	12/31/2019	90

<b>Name of Project</b>	<b>Owner</b>	<b>Value</b>	<b>Contracted Completion Date</b>	<b>Percentage Complete</b>
<b>DR-4340-USVI Recovery Support</b>	Subcontracting to FEMA under CCPRS	To be determined	4/24/2020	50
<b>County of Los Angeles Recovery Planning Update and Integration RSF</b>	County of Los Angeles, CA	\$98,310	2/28/2020	45
<b>SAOEM Family Assistance Center Planning and Full Scale Exercise TO Proposal</b>	City of San Antonio, TX	\$72,182	1/31/2020	90
<b>Franklin County, Ohio Coordinated Central Region Evacuation Plan</b>	Franklin County, OH Emergency Management	\$105,070	2/28/2020	75
<b>Langan Roosevelt Island Operating Corporation Appeal Support</b>	Roosevelt Island Operating Corporation, NY	\$40,000	12/31/2019	90
<b>Washington County Emergency Sheltering Framework</b>	Washington County, OR	\$49,752	4/30/2020	60
<b>Chicago Emergency Management and Communications Complex Coordinated Terrorist Attack Program Support</b>	City of Chicago, IL, Office of Emergency Management and Communications	\$299,900	6/30/2020	50
<b>Montgomery County Grant Administration Services for 2016 Disaster Recovery Home Buyout Project</b>	Montgomery County, TX	\$200,000	7/9/2020	50
<b>CalOES Surge Capacity Staffing</b>	State of California Office of Emergency Services	\$60,000,000	6/9/2022	25
<b>City of San Jose Post-Disaster Housing Plan</b>	City of San Jose, CA	\$48,414	1/31/2020	85
<b>City of Santa Rosa Fire Station #5 428</b>	City of Santa Rosa, CA	\$182,500	12/31/2019	95
<b>Mid-America Regional Council CCTA Regional Exercise Series</b>	Mid America Regional Council (MARC)	\$500,000	6/30/2020	50
<b>Diocese of Arecibo, Inc. Recovery Support</b>	Diocese of Arecibo, Puerto Rico	\$2,300,000	9/30/2020	50
<b>Diocese of Caguas, Puerto Rico Recovery Support</b>	Diocese of Caguas, Puerto Rico	\$1,000,000	9/30/2020	50
<b>Diocese of Fajardo-Humacao, Puerto Rico Recovery Support</b>	Diocese of Fajardo-Humacao, Puerto Rico	\$1,000,000	9/30/2020	50
<b>San Diego County Damage Assessment Plan and Survey Development</b>	San Diego County, CA	\$74,983	12/31/2019	95
<b>County of Alameda ABAHO PHP Med/Health Shelter Toolkit</b>	County of Alameda, CA	To be determined	5/1/2020	60
<b>Franklin County Comprehensive CCTA Project Rebid</b>	Franklin County, OH Emergency Management	\$264,378	6/30/2020	70

<b>Name of Project</b>	<b>Owner</b>	<b>Value</b>	<b>Contracted Completion Date</b>	<b>Percentage Complete</b>
<b>Bay Haven Charter Academy Disaster Management Financial Recovery Assistance</b>	Bay Charter Academy, FL	\$250,000	3/28/2021	25
<b>Greater Salt Lake CCTA Exercise Series</b>	Salt Lake County, UT, Unified Fire Authority	\$512,000	7/31/2020	60
<b>City of San Antonio Office of Emergency Management Active Threat Recovery Guide and Workshop Series</b>	City of San Antonio, TX	\$100,000	8/31/2020	50
<b>City of Panama City Long-Term Recovery Planning Support</b>	City of Panama City, FL	\$1,374,600	12/31/2019	95
<b>Catholic Extension Board Program Management Support</b>	Catholic Extension	To be determined	3/31/2020	75
<b>Barnes-Jewish Hospital Emergency Preparedness Support</b>	Barnes-Jewish Hospital	\$114,250	2/28/2020	75
<b>Palm Bay Education Group Disaster Mgmt Financial Recovery Assistance</b>	Palm Bay Education Group, FL	\$200,000	2/13/2021	30
<b>Panama City Housing Authority DR Consulting Services</b>	Panama City, FL, Housing Authority	\$1,350,000	2/11/2024	20
<b>Calhoun Liberty Hospital Association Disaster Recovery Administrative Services</b>	Calhoun Liberty Hospital Association, FL	To be determined	2/5/2022	25
<b>University of California Merced Emergency Operations Plan</b>	University of California, Merced	\$75,151	1/31/2020	90
<b>City of Houston, TX Complex Coordinated Terrorist Attack Program</b>	City of Houston, TX	\$463,372	1/25/2022	25
<b>Archdiocese of San Juan Comprehensive Disaster Recovery and Grant Management Services</b>	Archdiocese of San Juan, PR	To be determined	9/30/2020	40
<b>Plano, TX Disaster Recovery and Redevelopment Plan</b>	City of Plano, TX	\$70,312	2/29/2020	80
<b>City of Panama City Beach Disaster Recovery Administrative Services</b>	City of Panama City Beach, FL	\$746,240	1/7/2022	25
<b>Hawaii DOD Office of Homeland Security Emergency Response Planning Sync Matrix</b>	State of Hawaii	\$34,220	1/31/2020	85
<b>Bay District Schools Disaster Management Financial Recovery Assistance</b>	Bay District School Board, FL	\$4,375,000	12/11/2020	50
<b>City of Panama City Disaster Recovery Consultant Services</b>	City of Panama City, FL	\$7,000,000	12/11/2020	50
<b>Amtrak Incident Response Team (IRT) Exercise Program</b>	AMTRAK	\$750,000	7/31/2020	75

<b>Name of Project</b>	<b>Owner</b>	<b>Value</b>	<b>Contracted Completion Date</b>	<b>Percentage Complete</b>
<b>First National Bank Continuity of Operations Planning Support</b>	First National Bank	\$57,500	12/31/2019	95
<b>New York City Recovery Support 2018 to 2023</b>	New York City, NY	\$30,250,000	10/1/2021	35
<b>Montgomery County Flood Mitigation Assistance Consulting</b>	Montgomery County, TX	\$432,048	7/9/2020	70
<b>Horry County Hurricane Florence Recovery Support</b>	Horry County, SC	\$500,000	12/31/2019	95
<b>City of Santa Rosa, CA Disaster Recovery Services CDBG-DR</b>	City of Santa Rosa, CA	\$1,497,100	8/6/2020	70
<b>Washington Metropolitan Area Transit Authority Office of Emergency Management Training Exercises</b>	Washington Metropolitan Area Transit Authority	\$741,126	7/31/2020	75
<b>East-West Gateway Council of Governments CCTA Planning, Training &amp; Exercise</b>	East-West Gateway Council of Governments	\$899,481	7/30/2020	75
<b>California Office of Emergency Services Recovery Support Function Annexes REISSUE</b>	State of California	\$250,000	12/15/2019	100
<b>NISTAC FEMA PA Puerto Rico</b>	FEMA	\$645,500	4/24/2020	60
<b>Insight - FEMA NIC Collaborative TA Evac.</b>	Insight Technology Solutions, Inc.	\$12,012	3/15/2020	75
<b>MWCOG WMATA Metrorail Station Emergency Response Exercise Series</b>	Metropolitan Washington Council of Governments	\$707,006	4/30/2021	60
<b>Georgia Department of Natural Resources Seven County Project to Strengthen the Disaster Resiliency</b>	Georgia Department of Natural Resources	\$294,308	9/30/2020	65
<b>Sarasota Memorial Hospital Disaster Recovery and 404 Hazard Mitigation Grant Proposal Services</b>	Sarasota Memorial Hospital, FL	\$150,000	11/9/2020	75
<b>County of Santa Cruz, CA Disaster Recovery, Financial &amp; Grant Mgmt Support, Pre-Disaster Recovery</b>	County of Santa Cruz, CA	\$1,300,100	6/30/2020	80
<b>San Benito County 2017 Flooding Recovery</b>	San Benito County, CA	\$160,000	4/1/2020	80
<b>Surfside Beach, South Carolina Federal Emergency Management Agency Grant Program Services</b>	Surfside Beach, SC	\$125,000	1/19/2020	100
<b>North Carolina CDBG-DR Support</b>	North Carolina Division of Emergency Management	TBD	12/31/2021	50
<b>Howard County, Maryland Disaster Recovery Consulting Services</b>	Howard County, MD	\$352,301	9/30/2020	80

<b>Name of Project</b>	<b>Owner</b>	<b>Value</b>	<b>Contracted Completion Date</b>	<b>Percentage Complete</b>
<b>Grand Prairie Long-Term Disaster Recovery Management Services</b>	City of Grand Prairie, TX	\$300,000	10/31/2020	85
<b>AMTRAK Emergency Management and Corporate Security T&amp;E</b>	AMTRAK	To be determined	8/31/2020	85
<b>Harris County Metropolitan Transit Authority Pre/Post Disaster Administrative &amp; Management Services</b>	Harris County Metropolitan Transit Authority, TX	To be determined	6/17/2020	90
<b>City of Longmont CDBG-DR Staff Augmentation</b>	City of Longmont, CO	\$2,900,000	12/31/2019	100
<b>New College of Florida Disaster Recovery</b>	State University System of Florida	To be determined	6/30/2022	40
<b>University of North Florida Disaster Recovery Operations</b>	State University System of Florida	To be determined	6/30/2022	40
<b>University of West Florida Disaster Recovery</b>	State University System of Florida	To be determined	6/1/2022	40
<b>New York City Housing Authority Program Management Services</b>	New York City	\$2,800,000	12/31/2019	100

#### 14. Table B-2: Subcontractors

<b>Sub-Contractor Name</b>	<b>Address</b>	<b>Work to be Performed</b>
<b>AC Disaster Consulting (ACDC)</b>	2805 Lakeshore Drive Arlington, TX 76013	ACDC will support Hagerty across recovery programs, providing personnel and expertise in support of grant development, management, and closeout.
<b>CSRS, Inc</b>	6767 Perkins Road, Suite 200 Baton Rouge, LA 70808	CSRS will support Hagerty across recovery programs, providing personnel and expertise in support of grant development, management, and closeout.
<b>CSA Central, Inc.</b>	8200 NW 41 <sup>st</sup> Street., Suite 305 Doral, FL 33166	CSA will support Hagerty across recovery programs, providing personnel and expertise in support of engineering tasks.
<b>Anchor Consulting, Engineering and Inspection, Inc. (Anchor)</b>	450 Magnolia Avenue Panama City, FL 32401	Anchor will support Hagerty across recovery programs, providing personnel and expertise in support of engineering tasks.

# Attachment E

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Hagerty owns the standard office equipment that will be used to perform services under this contract, including computers, computer software, and other standard office equipment.



# Attachment F

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Per the instructions in Addendum 1, Hagerty presents our experience list and references below.

## Experience List

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Hagerty presents our experience successfully supporting the following clients:

### **1) New York City, Hurricane Sandy Recovery Support**

Following Hurricane Sandy, NYC engaged Hagerty to help manage its \$14 billion recovery effort. Hagerty consultants are currently working across the city directly with agencies on grant application and administration for a variety of federal disaster relief programs, including FEMA, Federal Highway Administration (FHWA), and Housing and Urban Development (HUD) grants. To date, Hagerty has helped the city obtain more than \$4.2 billion in CDBG-DR federal aid, including approximately \$510 million to offset NYC's local share of other federal recovery grants. In alignment with NYC's overall PA Program, our professionals supported NYC to:

- » Craft an insurance strategy to minimize the City's "obtain and maintain" and flood insurance requirements;
- » Develop cost estimates for improved or alternate permanent work projects supported by historic NYC prices and approved by FEMA;
- » Develop letters of interest (LOIs) for FEMA 404 Hazard Mitigation Grant Program (HMGP); and
- » Establish a centralized quality control process where all projects are reviewed to determine if the City is being appropriately reimbursed under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (Stafford Act).

Our work in NYC is exemplary of our approach to make mitigation and resilience central to every recovery grant. For example, the Steeplechase Pier was a 1,110-foot-long cross-shaped fishing pier and tourist attraction that was heavily damaged by Hurricane Sandy. Prior to Hagerty's engagement in the development of the Steeplechase Pier project, FEMA determined total eligible costs for repair were \$647,000. Working with our client, Hagerty reviewed the project and identified errors, omissions, and deficiencies in the Damage Description and Dimensions (DDD), Scope of Work (SOW), and Cost Estimating Format (CEF) sections of the grant proposal. One example of such an error was that FEMA's estimate relied on construction practices and methods that replaced the original tropical hardwood with standard treated southern yellow pine, resulting in significant loss of eligible funding. Additionally, FEMA did not include any of the required means and methods of construction components in their estimate, which omitted barges, cranes, dock workers, underwater inspections, and turbidity curtains. As a result of our involvement and justification, our client's project was obligated at \$10.1 million. This represents a 1,500 percent increase in reimbursement to our client.

In order to support the CDBG-DR Program, Hagerty mobilized a team of experts to embed with NYC's newly hired disaster recovery staff. Our seasoned staff began providing assistance to NYC, facilitating hiring new staff, providing ongoing training and technical assistance, and writing, editing, and publishing the CDBG-DR Action Plan and subsequent amendments. Key accomplishments of the team include identifying a path to make \$510 million in expenses eligible for reimbursement as the FEMA local match; developing a successful strategy for New York State concurrence for NYC to use a "coordinated match" accounting methodology when using CDBG-DR matching funds as the local match; and providing daily client consultation on problem solving, innovative solutions, compliance review, fiscal management, and strategic planning for oversight of \$4.2 billion in CDBG-DR funding.

## ***2) City of Panama City, Florida Disaster Recovery and City of Panama City Long-Term Recovery Plan***

The City of Panama City was catastrophically impacted by Hurricane Michael. Within the city limits alone, the City picked up more debris than the entire state of Florida did after Hurricane Irma. The City faced a \$160 million debris operation alone, not accounting for emergency protective measures or permanent work. Despite this herculean effort, the City's leadership has made every effort to use funding made available from Hurricane Michael to re-envision what the City could be after Michael. In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Hagerty and our partners developed engagement events with the public through the early summer of 2019 to identify how people want to build back their city, taking advantage of the FEMA 428 alternative procedures to remove severely damaged buildings that were not being fully utilized to create more green spaces and community areas. The Long-Term Recovery Plan will be published in October 2019 and will inform the project submission to FEMA and other federal agencies. While going through this long-term recovery planning process, Hagerty continues to submit completed work projects to FEMA and Panama City was one of the first applicants to receive funding from FEMA and FDEM, which totaled \$14 million within the first three months of Hagerty starting work.

## ***3) Bay District Schools, Hurricane Michael Recovery***

Hagerty is assisting Bay District Schools (BDS) in their recovery from the catastrophic damages caused by Hurricane Michael. BDS consists of 36 schools, two of which are under consideration for fifty percent determinations; in total BDS is responsible for 432 buildings, all of which received some level of damage. Due to the lack of staff available by FEMA to conduct site inspections, and the significant structural damages throughout the school district, Hagerty negotiated with FEMA to allow BDS to hire certified Architects to conduct their FEMA site inspections and complete the DDD, SOW, and Cost Estimate with the assistance of Hagerty's engineer and experienced staff to do reviews and the development of the CEF. This is enabling a more expeditious recovery as well as ensure that all damages are being fully documented to maximize FEMA reimbursement.

BDS was one of the first FEMA applicants to receive an obligated project within four months of Hagerty serving BDS. Additionally, Hagerty is supporting BDS in seeking funding from non-FEMA sources and was successful in securing a FEMA mission assignment for behavioral and mental health first aid training and a grant under Project School Emergency Response to Violence (SERV), which provides funding for mental health services for the children of Bay County.

## References

Hagerty presents the following references:

<b>Agency Name</b>	New York City Mayor's Office of Management and Budget
<b>Agency Address</b>	255 Greenwich Ave, 6th Floor New York City, NY
<b>Point of Contact Name and Title</b>	Calvin Johnson, Assistant Director, CDBG-DR
<b>Client Contact Information (telephone and email)</b>	212-788-6024 johnson@omb.nyc.gov
<b>Years Services Were Provided</b>	January 2013-Present
<b>Type of Services Provided</b>	FEMA PA Support, Hazard Mitigation Grant Program Support, CDBG-DR Support, FEMA Grants Management, Support to Many of New York City Government's Constituent and Sister Agencies

<b>Agency Name</b>	City of Panama City, FL
<b>Agency Address</b>	501 Harrison Ave Panama City, FL 32401
<b>Point of Contact Name and Title</b>	Jennifer Aldridge, Disaster Recovery Project Manager
<b>Client Contact Information (telephone and email)</b>	850-872-3004, jaldridge@pcgov.org
<b>Years Services Were Provided</b>	December 2018 – Present
<b>Scope of Services Provided</b>	FEMA PA Support, Recovery Planning, Community and Stakeholder Engagement

<b>Agency Name</b>	Bay District Schools
<b>Agency Address</b>	1311 Balboa Ave, Panama City, FL
<b>Point of Contact Name and Title</b>	Lee Walters, Director of Facilities
<b>Client Contact Information (telephone and email)</b>	850-814-9786, <a href="mailto:waltell@bay.k12.fl.us">waltell@bay.k12.fl.us</a>
<b>Years Services Were Provided</b>	January 2019 – Present
<b>Type of Services Provided</b>	FEMA Grants Management; Disaster Recovery Program Management; HMGP; Florida Hurricane Loss Mitigation Program

# Anti-Kickback Affidavit

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**ANTI-KICKBACK AFFIDAVIT**

STATE OF Illinois )

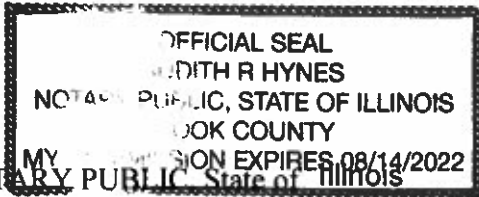
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COUNTY OF Cook )

I, the undersigned hereby duly sworn, depose and say that no portion of the sum herein bid will be paid to any employees of the City of Key West as a commission, kickback, reward or gift, directly or indirectly by me or any member of my firm or by an officer of the corporation.

By: Kateh

Sworn and subscribed before me this 17th day of December 2019.



Judith R Hynes  
at Large

My Commission Expires: August 14, 2022

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# Sworn Statement on Public Entity Crimes

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**SWORN STATEMENT UNDER SECTION 287.133(3)(A)**  
**FLORIDA STATUTES ON PUBLIC ENTITY CRIMES**

**THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.**

1. This sworn statement is submitted with Bid or Proposal for \_\_\_\_\_  
Emergency Management Consulting Services

2. This sworn statement is submitted by Hagerty Consulting, Inc.  
(Name of entity submitting sworn statement)

whose business address is 1618 Orrington Avenue, Suite 201, Evanston, IL, 60201

and (if applicable) its Federal Employer Identification Number (FEIN) is 37-1431085

(If the entity has no FEIN, include the Social Security Number of the individual

signing this sworn statement \_\_\_\_\_

3. My name is Katie Freeman  
(Please print name of individual signing)

and my relationship to the entity named above is Director of Operations

4. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including but not limited

to, any bid or contract for goods or services to be provided to any public or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, material misrepresentation.

5. I understand that “convicted” or “conviction” as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication guilt, in any federal or state trial court of record relating to charges brought by indictment information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an “affiliate” as defined in Paragraph 287.133(1)(a), Florida Statutes, means
  - a. A predecessor or successor of a person convicted of a public entity crime; or
  - b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term “affiliate” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm’s length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
7. I understand that a “person” as defined in Paragraph 287.133(1)(8), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with public entity. The term “person” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies).

X  Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and



convicted of a public entity crime subsequent to July 1, 1989, AND (Please indicate which additional statement applies.)

\_\_\_\_ There has been a proceeding concerning the conviction before a hearing of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)

\_\_\_\_ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

\_\_\_\_ The person or affiliate has not been put on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services.)



\_\_\_\_\_  
(Signature)

December 16, 2019

\_\_\_\_\_  
(Date)

STATE OF Illinois  
COUNTY OF Cook

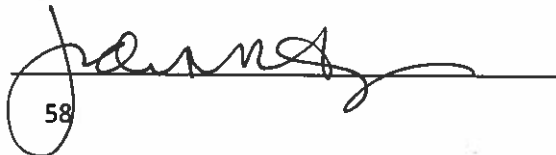
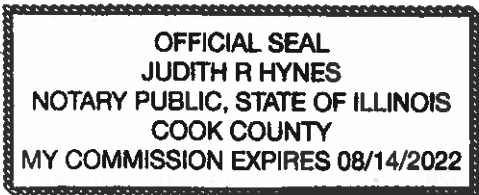
PERSONALLY APPEARED BEFORE ME, the undersigned authority,

Katie Freeman who, after first being sworn by me, affixed his/her

(Name of individual signing)

signature in the space provided above on this 17th day of December, 2019.

My commission expires: August 14, 2022

  
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# City of Key West Indemnification Form

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**CITY OF KEY WEST INDEMNIFICATION FORM**

To the fullest extent permitted by law, the CONSULTANT expressly agrees to indemnify and hold harmless the City of Key West, their officers, directors, agents and employees (herein called the "indemnitees") from any and all liability for damages, including, if allowed by law, reasonable attorney's fees and court costs, such legal expenses to include costs incurred in establishing the indemnification and other rights agreed to in this Paragraph, to persons or property, caused in whole or in part by any act, omission, or default by CONSULTANT or its subcontractors, material men, or agents of any tier or their employees, arising out of this agreement or its performance, including such damages caused in whole or in part by any act, omission or default of any indemnitee, but specifically excluding any claims of, or damages against an indemnitee resulting from such indemnitee's gross negligence, or the willful, wanton or intentional misconduct of such indemnitee or for statutory violation or punitive damages except and to the extent the statutory violation or punitive damages are caused by or result from the acts or omissions of the CONSULTANT or its subcontractors, material men or agents of any tier or their respective employees.

Indemnification by CONSULTANT for Professional Acts. CONSULTANT hereby agrees to indemnify the City of Key West and each of its parent and subsidiary companies and the directors, officers and employees of each of them (collectively, the "indemnitees"), and hold each of the indemnitees harmless, against all losses, liabilities, penalties (civil or criminal), fines and expenses (including reasonable attorneys' fees and expenses) (collectively, "Claims") to the extent resulting from the performance of CONSULTANT'S negligent acts, errors or omissions, or intentional acts in the performance of CONSULTANT'S services, or any of their respective affiliates, under this Agreement. If claims, losses, damages, and judgments are found to be caused by the joint or concurrent negligence of the City of Key West and CONSULTANT, they shall be borne by each party in proportion to its negligence.

The indemnification obligations under the Contract shall not be restricted in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the CONSULTANT under Workers' Compensation acts, disability benefits acts, or other employee benefits acts, and shall extend to and include any actions brought by or in the name of any employee of the CONSULTANT or of any third party to whom CONSULTANT may subcontract a part or all of the Work. This indemnification shall continue beyond the date of completion of the work.

CONSULTANT: Hagerty Consulting, Inc.

SEAL:

1618 Orrington Avenue, Suite 201, Evanston, IL, 60201

Address



Signature

Katie Freeman

Print Name

# Equal Benefits for Domestic Partners Affidavit

**EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT**

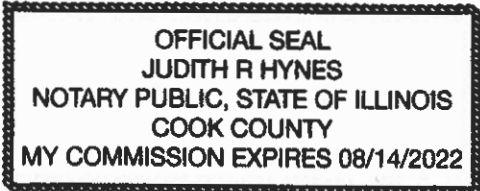
STATE OF Illinois )  
 : SS  
COUNTY OF Cook )

I, the undersigned hereby duly sworn, depose and say that the firm of Hagerty Consulting, Inc.

provides benefits to domestic partners of its employees on the same basis as it provides benefits to employees' spouses, per City of Key West Code of Ordinances Sec. 2-799.

By: Kalca O...

Sworn and subscribed before me this 17th day of December, 2019.



NOTARY PUBLIC, State of Illinois at Large

My Commission Expires: August 14, 2022

\* \* \* \* \*

# Cone of Silence Affidavit

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# State Business License

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**2019 FOREIGN PROFIT CORPORATION ANNUAL REPORT**

DOCUMENT# F10000003279

**Entity Name:** HAGERTY CONSULTING SERVICES, INC.

**Current Principal Place of Business:**

1618 ORRINGTON AVE  
SUITE 201  
EVANSTON, IL 60201

**Current Mailing Address:**

1618 ORRINGTON AVE  
SUITE 201  
EVANSTON, IL 60201

**FEI Number:** 37-1431085

**Certificate of Status Desired:** No

**Name and Address of Current Registered Agent:**

CORPORATION SERVICE COMPANY  
1201 HAYS STREET  
TALLAHASSEE, FL 32301 US

*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.*

**SIGNATURE:** \_\_\_\_\_

Electronic Signature of Registered Agent

Date

**Officer/Director Detail :**

Title	PST	Title	DIRECTOR
Name	HAGERTY, STEPHEN H	Name	ALTENBERND, LISA
Address	6 MILBURN PARK	Address	6 MILBURN PARK SUITE 201
City-State-Zip:	EVANSTON IL 60201	City-State-Zip:	EVANSTON IL 60201

*I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.*

**SIGNATURE:** STEPHEN H HAGERTY

**PRESIDENT**

**03/19/2019**

Electronic Signature of Signing Officer/Director Detail

Date