

REQUEST FOR PROPOSAL RFP #22-007

**City of Key West, Florida**

**CDBG Grant**

**Administration Services**

Due: 05.10.2023

Submitted by: Metric Consulting, LLC

Tab 1

**Cover Letter**

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**CDBG Grant Administration Services RFP #22-007**

Attention: City Clerk  
City of Key West  
1300 White Street  
Key West, FL 33040

**Re: CDBG Grant Administration Services (RFP #22-007)**

Dear City of Key West RFP Review Panel:

**Metric Consulting, LLC (Metric)** is pleased to submit our proposal for **CDBG Grant Administration Services (RFP #22-007)** for City of Key West (the City). We understand that the City's intent is to hire a consultant to provide a range of services related to the administration of Community Development Block Grant Program funds including but not limited to necessary planning, application for funding, administration, and implementation services. As the projects are funded through the U.S. Department of Housing and Urban Development (HUD), we understand that a strong baseline understanding of HUD's policies and procedures is vital, as well as strict compliance with Title 2 of the Code of Federal Regulations, Part 200 (2 CFR Part 200). Our mission is to provide the City with a trusted partner that can efficiently deliver grant program and implementation services for the City's CDBG funds.

Founded in Miami in 2015, Metric has over seven years of grant administration and management experience, as well as other similar services that the Scope of Work encompasses - such as grant application processes and financial administration. Prior to 2015, Metric existed as the emergency management division of our partner firm, **Metric Engineering, Inc. (Metric Engineering)** - a Miami-based transportation planning and engineering firm with over 46 years of engineering experience and over 30 years of experience in the emergency management sector.

Our staff have worked on federally funded construction and non-construction projects, including grant administration for HUD, the U.S. Department of the Treasury (Treasury), American Rescue Plan Act (ARPA), HUD funded HOME Investment Partnerships Program (HOME-ARP), and numerous state and local funding sources. As a Florida-based company, we understand that place matters and have worked hand-in-hand with numerous clients here, however we understand that every client is unique. The City's Community Development programming looks different from other counties and cities in Florida. With that in mind, we are committed to delivering the City's projects in a way that best suits its citizens and stakeholders.

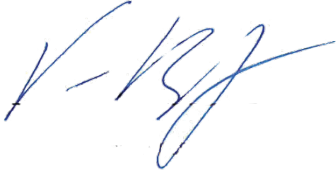
Led by **Veronica Benitez, Psy. D**, Metric is a certified Women's Business Enterprise and Woman Owned Small Business through the Women's Business Enterprise National Council. Our proposed Principal is **Martin Altman, PMP, Vice President of Emergency Management and Long-Term Recovery**. As a former FEMA Public Assistance (PA) Infrastructure Branch Director, Mr. Altman understands the complexities involved with managing federal funding streams and their processes.

Our philosophy is founded on transparency. We have a long history of working with federal and state entities and the staff who work there. We believe that a smooth grant administration process is based on mutual trust, and that mutual trust thrives on strong relationships. We offer a complete approach to federal grants management, and will combine our engineering, project management, regulatory compliance, and project controls expertise to generate results. We understand that successful programs are not driven by policy alone.

They are driven by intentional design for action, innovative solutions to common problems, embedded compliance, and sound financial stewardship. Our team has supported clients through numerous monitoring visits and compliance reviews conducted by entities including HUD.

We look forward to the opportunity to provide an encompassing suite of services to help the City implement its Community Development Grant program. We will work in tandem with HUD, and any other funding sources involved to ensure our services adhere to federal and state requirements. Our personnel are readily available for this contract, and we are committed to providing outstanding services that results in cost-effective and community-driven solutions within allotted time periods.

Sincerely,



Veronica M. Benitez, Psy. D | President  
[veronica.benitez@metric-consulting.com](mailto:veronica.benitez@metric-consulting.com)

**Information  
Page**

## 2. Information Page

Metric Consulting, LLC is the prime vendor submitting to the City of Key West's request for proposals for CDBG Grant Administration Services (RFP #22-007). Below are the persons who will serve as project manager for the contract and are authorized to make representations for Metric Consulting:



### Name of the Project Manager for this Response:

Martin Altman | VP, Emergency Management & Long-Term Recovery

13940 SW 136th Street

Miami, FL 33186

(504) 874-1641

[martin.altman@metric-consulting.com](mailto:martin.altman@metric-consulting.com)



### Person Authorized to Legally Bind the Proposer:

Veronica M. Benitez, Psy. D | President

13940 SW 136th Street

Miami, FL 33186

(305) 235-5098

[veronica.benitez@metric-consulting.com](mailto:veronica.benitez@metric-consulting.com)

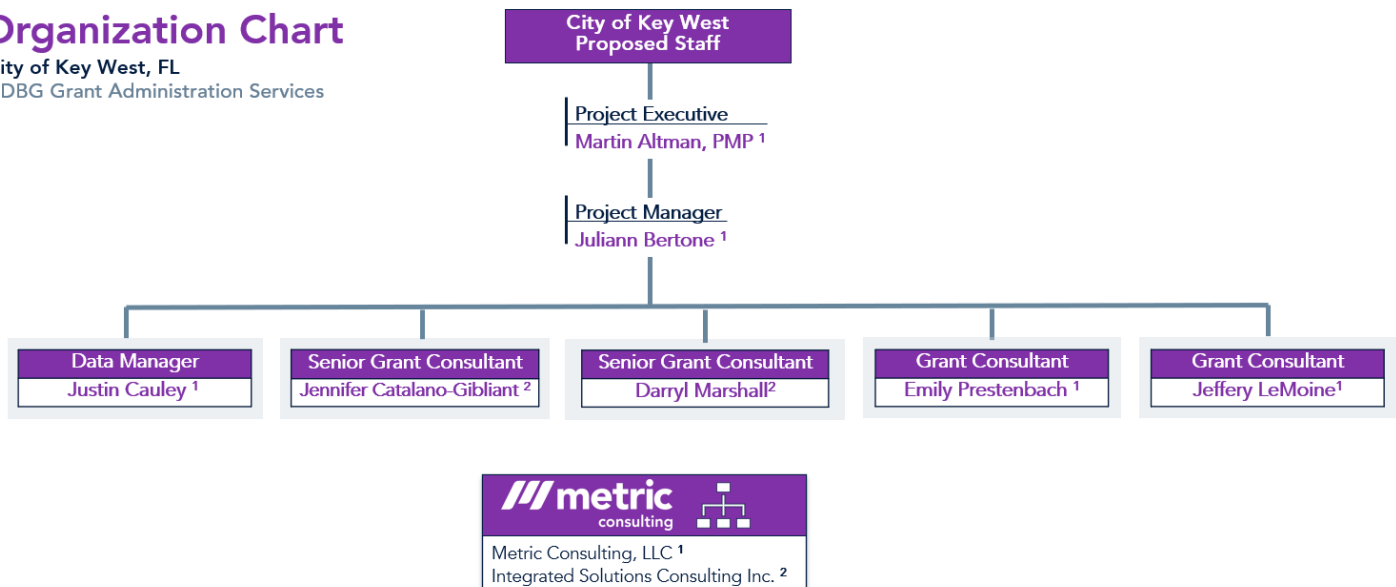
**Organization  
Chart**

# 3. Organizational Chart

We have included an organizational chart on the following page that illustrates the project leadership and reporting responsibilities of our team, as well as how we will interface with the City. Our team is led by Mr. Martin Altman, PMP, Project Executive. Mr. Altman will work hand-in-hand with our assigned Project Manager, Ms. Juliann Bertone, who will lead the activities on this contract. Additional staff that we have included are assigned to specific roles that will provide Ms. Bertone with exceptional support and will allow our team to exceed the City’s expectations throughout the duration of the contract. Brief biographies for each member of our team are included following the organizational chart.

## Organization Chart

City of Key West, FL  
CDBG Grant Administration Services



## Project Staff

We are proud of our history as a leading provider of disaster recovery services and are pleased to introduce the team we have selected for this contract. **The individuals listed on these pages are the individuals that will serve the City.** They will be 100% dedicated to assisting the City with this contract. Our grant management approach addresses all areas that are covered in the City’s Scope and is backed by a foundational belief that no matter the funding stream, compliance is a key component to protecting your recovery dollars.

We believe in the continuous improvement of our team and those around us, and we will support the City with the best staff we have. Our team includes staff with expertise in executive-level consulting and government relations, strategic planning, grant management and eligibility, and project management. We have improved from decades of unexpected challenges, and we have utilized lessons learned to carefully refine our processes to best suit each unique situation. **We believe our staff is the most valuable asset that we can offer the City.** Our team was carefully selected to deliver a combination of subject matter expertise, trusted insight, operational knowledge, and technical skills. The matrix below illustrates the staff we have proposed for this



contract. Metric will be the single point of contact for the City, however it is estimated that 20% of the work will be conducted by the ISC staff members included within the staff below.

Name	Role	Years of Experience
Martin Altman, PMP	Project Executive	35
Juliann Bertone	Project Manager	10
Darryl Marshall (ISC)	Senior Grant Consultant	16
Jennifer Catalano-Gibliant (ISC)	Senior Grant Consultant	13
Justin Cauley	Data Manager	10
Emily Prestenbach	Grant Consultant	6
Jeffery LeMoine	Grant Consultant	20

## Staff Profiles

All staff listed below are remote-based employees whom can be available to the City of Key West on site as needed.

### Martin Altman, PMP | Project Executive (Metric)

Mr. Altman has over 35 years of leadership experience managing and implementing disaster planning and recovery program management for public and private sector clients. He currently serves as Metric’s Vice President of Emergency Management and Long-term Recovery. Mr. Altman holds a Program Management Professional (PMP) certification and has in-depth expertise in all phases of disaster management - including planning, preparedness, hazard mitigation, response and recovery programs, post-disaster re-development planning, audit compliance, process improvement, quality assurance, business development, and resiliency planning. Mr. Altman served as a FEMA Region VII Project Officer and Closeout Specialist for Kansas City, Missouri, and was then appointed the FEMA Public Assistance Infrastructure Branch Director for the State of Florida’s Long-Term Recovery Office, where he managed the FEMA PA Program. There, he oversaw more than 200 staff members working on Project Worksheet (PW) development, the closeout of nine federally declared disasters, and over 4,000 applicants - ultimately resulting in the recovery of more than \$14 billion in funds. He has worked on over 50 presidentially declared disasters and has served in many leadership and technical support roles along the way.

### Juliann Bertone | Project Manager/City Point of Contact (Metric)

Ms. Bertone brings 10 years of extensive experience in cross-cutting federal compliance requirements and development and execution of federally funded programs. **She will serve as the City’s Project Manager/City Point of Contact.** Ms. Bertone began her career in state government, where she served the Colorado Department of Public Health as part of their communications team. She has subject matter expertise in disaster recovery, financial management and internal controls, community resilience, CDBG-DR housing, economic development, infrastructure and planning, capacity building programs, and cross-cutting federal regulations. She spearheaded efforts in Finney and Neosho Counties (Kansas), where she simultaneously delivered six recovery programs - including a program which provided rent, utilities, and mortgage assistance to residents through the U.S. Treasury’s Coronavirus Relief Fund (CRF). **Under Ms. Bertone’s leadership, all programs launched in September 2020 and were closed by December 2020 - after successfully expending the Counties’**

**CRF allocation and serving approximately 300 distinct applicants.** Prior to that, she served as the Portfolio Manager for the Puerto Rico Department of Housing's CDBG-DR funded housing programs that were directed at serving the island's most vulnerable citizens. In that engagement, Ms. Bertone coordinated efforts with six subrecipient HUD-certified counseling agencies and social interest housing providers around the island to deliver complete housing counseling services and solutions to house vulnerable populations like those facing homelessness or living with substance abuse issues or AIDS. Ms. Bertone is well-versed in training and technical assistance, subrecipient management, program design, and federal grants compliance requirements.

### **Darryl Marshall | Senior Grant Consultant (ISC)**

Mr. Marshall has over 16 years of experience in the disaster recovery and response space. He provides expertise in FEMA PA, HMGP, and CDBG. In his most recent role, Darryl worked in Grants Portal as a Program Delivery Manager where he performed closeout on various applications. He is also well versed in computer, written and oral skills.

### **Jennifer Catalano-Gibliant | Senior Grant Consultant (ISC)**

Ms. Catalano-Gibliant brings more than 13 years of experience managing large-scale disaster projects. As the Director of Operations and Senior Manager of Applicant relations, she aided 130,050 homeowners in receiving \$9.5B in CDBG-DR funds. She had expertise in HUD grants, policies, program policy, program design, record training, and paralegal. While working with Louisiana's Director of Homeowner Programs, she developed and aided in implementation of policies and procedures for a Low-to-Moderate Income Housing Eligibility, Auditing and Monitoring Program.

### **Justin Cauley | Data Manager (Metric)**

Mr. Cauley was instrumental in delivery of over \$20 million across Finney, Seward, and Neosho Counties, Kansas, where he served as a Senior Closeout Specialist: tasked with creation of policies and procedures, quality control, and ensuring performance and production standards for the Rent, Mortgage, and Utilities Assistance Program in each county. **He will serve as the City's Applicant Manager.** Prior to that, Mr. Cauley served as the director of Uniform Relocation Act (URA) compliance for the Puerto Rico Department of Housing's \$10.2 billion portfolio of 26 CDBG-DR funded programs. After Hurricane Sandy devastated New York, Justin led a team of analysts responsible for delivering the Small Rental Repair Program, Affordable Rental Opportunities Program, and Interim Mortgage Assistance program for the Governor's Office of Storm Recovery (GOSR), which served over 1,400 applicants by providing CDBG-DR funding to maintain or create affordable housing stock.

### **Emily Prestenbach | Grant Consultant (Metric)**

Ms. Prestenbach has six years of experience as a Grant Consultant in the FEMA PA Program. As a Disaster Recovery Analyst, she has experience manipulating data and finding creative ways to gain insight from raw data. She has a background in designing and developing relational databases. She also provides financial accounting reconciliation guidance to clients during the grant closeout process. Ms. Prestenbach is an analytical, detail-oriented, and accomplished data professional with a track record of success in collecting, analyzing, and improving business data to enhance solutions.

## Jeffery LeMoine | Grant Consultant (Metric)

Mr. LeMoine has over 20 years of leadership experience, including time spent developing and managing inventory data processes to ensure proper inventory and staffing needs were met. He has also been a lead Critical Infrastructure Field Inspector and provided damage assessments, project formulation, and the implementation of overhead drone technology to inspect infrastructure. He is adept at providing technical data geared toward mitigation strategies to increase resiliency and strengthen critical infrastructure, and he has developed mitigation and resilience strategies to meet changing community lifeline criteria.

## Resources and Capability to Meet the Needs of Multiple Contracts

Having served numerous contracts over the last seven years, our team is able to leverage our experience with a deep understanding of how to properly manage a project's schedule and budgetary goals. We understand that it is within the City's best interest to meet time and budget requirements throughout the duration of the contract; therefore, we commit to making this our priority. Adherence to a project schedule is imperative to maintaining budget and quality, and ultimately the success of the project's lifecycle. Consequently, the development of a logical and sustainable schedule will be the first step taken as soon as we are contracted with the City.

When properly used, a schedule is a management tool that can help prevent problems from occurring. Monitoring and adjusting the schedule is a significant part of our Project Manager's effectiveness in managing the entire process. Effective schedule management means responding to the changing needs and requirements of the project. In the event that the schedule shows a delay, we will develop a schedule recovery plan that outlines procedures to recover. This will include assigning additional resources to any lagging activities and beginning other activities earlier than planned.

We are cognizant that delays may originate from outside entities such as the public or outside agencies. With these outside factors in mind, we will leverage our resources to proactively engage stakeholders and avoid impacts to the project schedule. **Overall, we will meet time and budget requirements by implementing the following core principles:**

- 1 Providing Qualified and Capable Personnel** • We believe that quality begins at the top and is demonstrated by personnel who lead through example. Our team will be led by Juliann Bertone, our proposed Project Manager. She brings over 10 years of experience in grant management and administration, planning, federal regulations, and more.
- 2 Establishing a Realistic Schedule and Budget** • Each contract is unique and has its own demands, requirements, and solutions. With each project, our team will develop a specific project plan that incorporates a comprehensive set of qualitative and quantitative performance metrics.
- 3 Recognizing and Understanding Project Stakeholders** • We understand that the City's initiatives are more than just words on paper, and that adverse effects may occur if we do not execute deliverables in a timely manner. We strive to facilitate coordination, understanding, and support from all stakeholders – regardless of economic situation or position.
- 4 Providing Quality in Everything We Do** • Quality is not limited to one finite area of operations. It is a foundational component of our culture and is maintained in every task our team carries out.

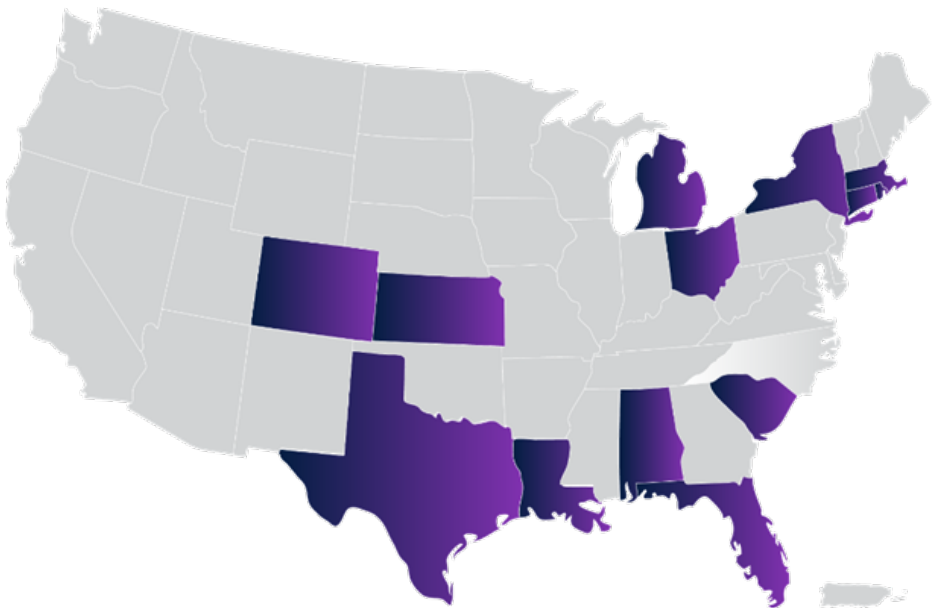
**Company  
Information**

## 4. Company Information

**Metric Consulting, LLC (Metric)** is a privately held, minority-owned consulting firm that specializes in comprehensive grant administration and management, as well as disaster recovery, including debris monitoring and management, and short and long-term recovery from natural disasters and manmade events. Metric was founded in June of 2015 as a firm dedicated to the pursuit of long-term recovery and resilience. Prior to 2015, we were the EMS division of Metric Engineering, Inc. - a well-renowned transportation planning and engineering firm with over 46 years of transportation engineering experience and three decades of disaster recovery experience. **Metric's federal reimbursement rate is second-to-none in the industry. With over \$2 billion in recovered costs and a 99.9% cost recovery rate, Metric is extremely proud of the success of our emergency management experts.** Metric's knowledge of federal and state level reimbursements spans multiple agencies, regions, and niche services.

Additionally, we have provided comprehensive emergency management planning and plan development that has focused on mitigation, incident operations, logistics, recovery, and continuity of operations. Our grant management approach is backed by a foundational belief that no matter the funding stream, compliance is a key component to protecting your recovery dollars. We have extensive experience in program design and policy development, vendor management, federal procurement regulations, and grant closeout.

Our team has in-depth experience in federal regulations and funding sources, and our expertise has been utilized by communities of all sizes throughout the United States. We understand the intricacies of the laws, regulations, policies, timelines, processes, and systems that govern ARPA funds, and we can break these topics down into simple terms and easily understood action items. Our interdisciplinary team has extensive experience providing consultation services and project management for various federal funding programs.



In addition to being well-versed in a variety of federal, state, and local funding sources, our team has successfully applied for and won funding for a diverse set of clients throughout the United States. As a firm, we have provided grant writing and administrative services for 10+ years, including work on infrastructure development and maintenance, technology, transportation, workforce development, records management, energy efficiency, and sustainability projects.

Our experience has taught us the importance of understanding the funding sources that our clients use to finance their projects. We know that the myriad of regulations governing federal, state, and local funding streams are complex and based on decades of precedent. That said, we know how to successfully navigate the intricacies involved with federal, state, and local programs throughout each step of the process - from grant research and development to grant management and the successful allocation of awarded funds.

We are well-versed in several programs that are funded by the federal government, including not only the EDA but also the Community Development Block Grant (CDBG) Program. Each funding source has specific requirements that must be met and are not typically associated with other funding sources. Our team offers a wrap-around approach to grants management - combining our engineering, project management, regulatory compliance, and project controls expertise to generate exceptional results.

Additionally, we have gained extensive and documented knowledge and experience coordinating with federal, state, and local agencies. We are pleased to offer our expertise and resources to assist the City with its grant consulting needs.

## Our Capabilities

Our team has in-depth experience in both federal and state regulations and funding sources, and our expertise has been utilized by communities of all sizes throughout the state of Florida and across the United States. We understand the intricacies of the laws, regulations, policies, timelines, processes, and systems that govern federal funds, and we can break these topics down into simple terms and easily understood items. In addition to being well-versed in a variety of federal, state, and local funding sources, our team has successfully applied for and won funding for a diverse set of clients throughout the United States. As a firm, we have provided grant management and administrative services for 10+ years, including work on infrastructure development and maintenance, technology, transportation, workforce development, records management, energy efficiency, sustainability projects, and more.

Our experience has taught us the importance of understanding the funding sources our clients use to finance their projects. We know that the wide range of regulations governing federal, state, and local funding streams are complex and are based on decades of precedent. With that said, we understand how to navigate the intricacies involved with federal, state, and local programs from the grant research and development stage through grant management and the successful allocation of funds.

We are adept at leading clients through programs administered under FEMA, including the FEMA PA and FEMA IA programs, and are also well-versed in several programs that are funded by HUD and the US Treasury, such as ARPA and the CDBG Programs. Our team offers a 360-degree approach to grants management, combining our engineering, project management, regulatory compliance, and project controls expertise to generate results.

Partnered with Integrated Solutions Consulting, we have access to the state-of-the-art grant Management system "Odysseus". With this program we can provide reports at any given time, audit ready information, and complete transparency to any information requested. This is a fool proof system that provides accurate information at a moment's notice.

**Approach and  
Methodology**

# 5. Approach and Methodology

## Proposed Management Plan

As a family-owned business, we believe in treating all of our clients like family and going the extra mile to provide unwavering guidance and services at the highest quality. We will rely on our multi-faceted engineering, federal grants management, and CDBG expertise to provide technical advisory services and regulatory compliance expertise to determine eligibility of CDBG-DR, CDBG-MIT, and CDBG-CV expenses, review of contracts and purchasing documentation, oversight and guidance to guarantee compliance with United States Department of Housing and Urban Development (HUD) standards, OMB Uniform Guidance, 2 CFR, Part 200 including reporting requirements, proper audit and record keeping documentation, and Florida Department of Economic Opportunity funding agreements.

We will work directly with the City and the DEO to ensure the public facilities projects listed in the Scope are executed in an efficient, successful manner. We offer a deep bench of policy experts, planners, civil engineers, and certified project management professionals with experience in all phases of CDBG grant administration. Our team includes former FEMA staff and other experts who have managed CDBG projects since Hurricane Katrina.

## Project Approach

### Action Plan Amendments and Substantial Amendments

Our team includes former FEMA staff, long-time practitioners of CDBG projects, and planning and resilience experts. We have aided grantees across the country in the development of unmet needs assessments, Annual Action Plans, and Action Plan amendments. We possess a deep understanding of HUD's expectations for your Annual Action plan amendments, inclusive of budget and program projections and accurate cost categorization. We understand that well-crafted Annual Action Plans, smart budgets, and accurate projections translate to actionable, successful programs.

We know that it is not enough to craft a plan - each plan must be actionable, and it must include a budget strategy that ensures administration, planning, and public services caps are adhered to while allowing expenditure rates to meet overall expenditure timelines. When amendments to the City's Action Plan are needed, Ms. Bertone will lead efforts to coordinate resources, analyze data, and craft amendments that support the City's evolving recovery objectives and timelines. With each amendment, our team will strive to strengthen the City's internal capacity through intentional knowledge transfer and a deliberately collaborative approach with the City. We know that the City's Action Plan is a living document - one which will continue to guide recovery through closeout. Ms. Bertone will deliver detailed strategy and timelines for each necessary Action Plan amendment throughout the life of the program.





Figure 1: Proposed timeline for substantial amendment to Action Plan

### CDBG Policies and Procedures Amendment

When crafting updates to program policies and procedures, we will focus on meaningful engagement of available information and potential program impacts of policy changes to arrive at context-sensitive and community-supported solutions. We will work within the City’s Action Plan to update program frameworks - including eligibility and priority criteria, award caps and calculation, involved stakeholders or administering entities, program timelines and production goals, and program processes.

As the City’s CDBG grant approaches closeout, it will be important to account for how any policy or procedural adjustments impacted the City’s ability to deliver the funds’ intended benefit, while simultaneously staying on track for successful closeout. Prior to finalizing any policy or procedural change, our team will present the City with a summary of proposed impacts of the change, along with reasonable alternatives and their potential impacts.

We design policy to be actionable, accounting for how it will be enacted from the start. A workflow with defined responsible parties and sub-processes will accompany policy/procedural change submissions for each update, which will allow the City’s policy reviewers to see how each policy translates into an actionable, operational program, and how each adjustment changes existing program processes.

We create standard operating procedures (SOPs) as step-by-step guides, and they are designed to empower readers to easily achieve pre-determined end results. Each SOP will be drafted in a standard template and will use existing material to ensure that information is included in a comprehensive and consistent format.

For example, each SOP will include:

- An outline of the role of each individual
- Step-by-step instructions on how to execute each process (including screenshots when applicable)
- Cross-reference of documents and supporting materials associated with the SOP
- Change log to track iterations of each SOP with dates of update

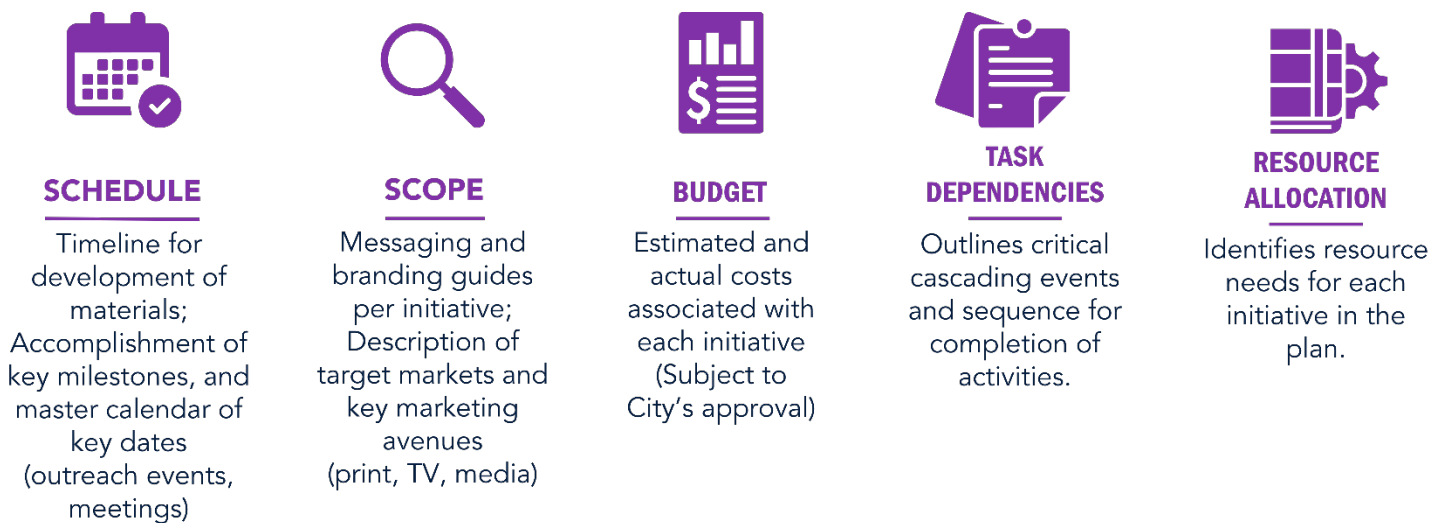
## Establish Timelines, Goals, Metrics, and Deliverables

Setting clear expectations at the beginning of any engagement lays the foundation for the life of each project by aligning stakeholder expectations and project purpose, informing stakeholders of Scope and project objectives, and discussing how stakeholder participation in each program phase contributes to overall success.

Mr. Altman, the proposed Principal for this engagement, is a licensed Project Management Professional (PMP). He will rely on his technical training and expertise to establish timelines and metrics, and he will outline clear project deliverables.

Beginning with the kickoff meeting, Mr. Altman will lead a series of project planning initiatives to deliver the most comprehensive strategic project management plan possible, based on methodologies endorsed by the Project Management Institute.

Led by Mr. Altman, our team will collaborate with the City to plan sessions to define project objectives and key opportunities to pursue, as well as priority initiatives to target. The Strategic Project Management Plan is a master planning document that encompass all aspects and lifecycles of the project's planned initiatives from beginning to end.



**Figure 2: Major components of the Strategic Project Management Plan**

The Strategic Project Management Plan establishes the baseline to monitor progress and sets reasonable expectations that City staff, key stakeholders, HUD, and the City's citizens can count on. Throughout the life of the program, our team will maintain the City's Strategic Project Management Plan to keep the City updated on critical path and key milestones, task dependencies, any identified slack, resource allocation, and activity status.

Our team will deliver your Strategic Project Management Plan in accordance with your vision, which charts a simple path from today through closeout - based on actionable planned activities. We will work with the City to establish, communicate, prioritize, and enforce goals in alignment with program and recovery priorities.

Clear expectations will be communicated to all involved parties at the outset, and they will then be monitored and controlled throughout the life of the engagement. If things begin to veer off track, our team will work to mitigate negative impacts of any slippage and get the project back on track.

The Strategic Project Management Plan will be intentionally crafted to serve the City throughout its CDBG grant. The plan will serve as a roadmap to completion of initiatives outlined in the Action Plan, and will be deliberately crafted to allow for the changes any agency experiences over the long run - such as staff promotions, onboarding, adjustments in department responsibilities, etc.

## Technical Assistance Relative to the Project Scope

We understand the myriad of compliance requirements that govern the City's CDBG allocations. We are committed to delivering programs and projects that weave compliance through every aspect of design and execution. We believe that making compliance a standard daily practice is the best way to ensure overall regulatory compliance, and that it will foster an environment where transparent financial stewardship thrives.

We know that compliance is not a stand-alone activity - it must be embedded throughout all resources, materials, policies, and procedures. Our team provides technical consulting to help our clients navigate regulatory snare to administer effective, efficient, and compliant projects and programs. Compliance with applicable federal regulations, law, and guidance is our number one priority.

Our team will provide the City with comprehensive, efficient solutions for key compliance components associated with managing a CDBG grant, including compliance with the City's applicable Federal Register Notices, monitoring, record retention, embedded financial controls and processes that ensure compliance with 2 CFR Part 200 and other relevant regulations, provision of services to ensure compliance with the URA, environmental review, and compliance with cross-cutting requirements such as the Davis-Bacon Act and Section 3. For all projects seeking assistance under the current CDBG funds, and any future funds allocated for Mitigation, provided by DEO, our team will ensure that the City receives the required Environmental Clearance from DEO prior to the City being able to commit CDBG funds.

## Project Understanding

Metric's extensive knowledge and experience with HUD CDBG programming, the Robert T. Stafford Disaster Relief and Emergency Assistance Act, and understanding of 2 CFR Part 200 requirements make our team extremely well suited to exceed the City's needs.

Headquartered in Miami, we understand the importance of planning for resiliency in coastal areas. We also understand the myriad environmental regulations that apply to federally-funded projects, from social justice concerns to endangered species. Our team includes trained professionals who can also incorporate planning for climate change and the uncertainties of sea level rise when pursuing strategic mitigation projects with federal funds. Our team has aided government entities around the southeastern United States with coastal resilience planning, coastal and shoreline studies, and green infrastructure projects intended to protect and preserve waterways, wetlands, and beaches.

Our team members have performed thousands of construction inspections, including damage assessments and construction oversight inspections, for CDBG-DR programs across the country, including in Florida, Louisiana, North Carolina, and Texas. We offer skilled professionals who are technical experts with field-tested experience. Our Team has supported major CDBG-funded housing recovery programs in response to some of our nation's largest disasters, including Hurricanes Maria, Irma, and Harvey.

## Project Control

Based on ongoing total quality management, we will work with the City to identify opportunities for streamlining processes or maximizing efficiency. Total quality management is essential to the continuous improvement of the City's program through the prevention, detection, and mitigation of outliers and inefficiencies which may jeopardize program success.

Our total quality management philosophy focuses on preventative actions, bolstered by corrective actions. Preventative actions, like built-in inspection and quality control checkpoints, mitigate risk of costly mistakes and inefficiencies. Corrective actions, usually triggered by the results of preventative actions, pin-point root cause of non-performance or deviation from established performance standards and employ solutions to get a program back on track.

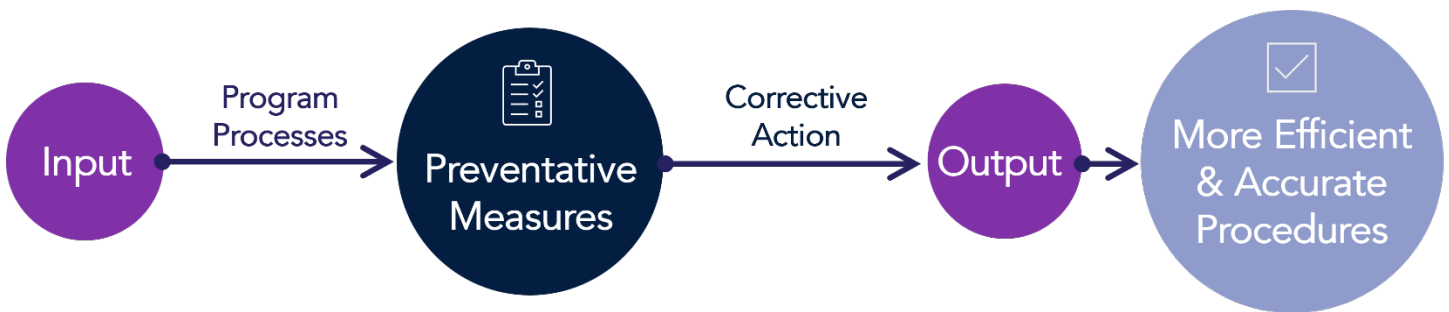


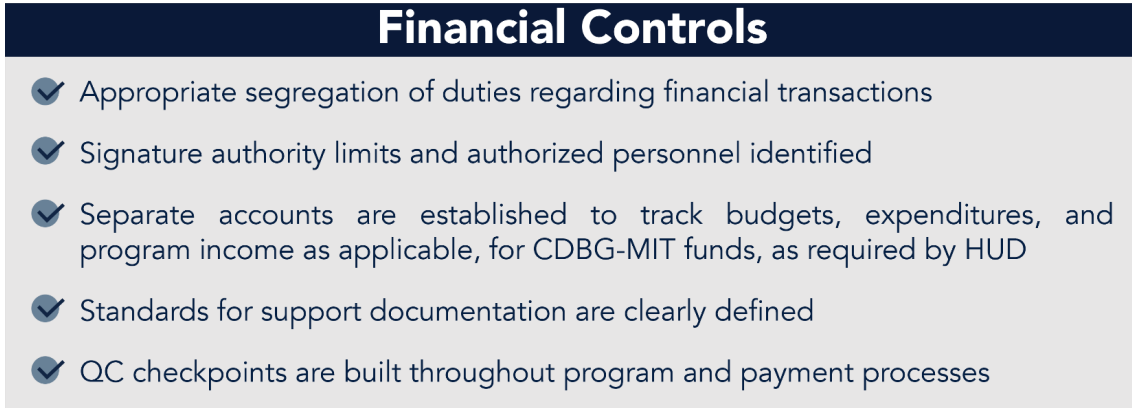
Figure 3: Metric's project control process

Ongoing quality and change management is essential to ensuring the City's programs are adaptable, while also remaining nimble enough to efficiently achieve recovery goals. We understand what works and are committed to presenting the City with thoroughly analyzed, creative pathways for success.

## Program/Financial Compliance Requirements & Local Financial Procedural Support

Compliant financial management and timely expenditures will continue to be key evaluation factors that oversight entities use to gauge the success of a program. **HUD's primary focus will be on appropriate and timely expenditures and beneficiaries served.** Our team will deliver strong internal controls to protect the City's recovery dollars and control the program budget.

Strong internal controls in cost and budget control are critical for transparent financial stewardship and to ensure funds reach intended beneficiaries as efficiently as possible. We will assist the City by strengthening existing controls and implementing new controls that comply with the "Standards for Internal Control in the Federal Government", issued by the Comptroller General of the United States, or the "Internal Control Integrated Framework", issued by the Committee of Sponsoring Organizations of the Treadway Commission.



**Figure 4:** Internal financial controls that will aid the City with DEO, HUD, and State compliance

In addition to proper financial controls, it is imperative to put adequate budgetary controls in place to ensure grant funds are spent responsibly and in accordance with projections. Project Coordinators will work with providers and program leads to set budgetary controls and to project future expenditures. We will track budgets in accordance with agreed upon budgets and projections, and we will work with the City to forecast funding shortfalls or surpluses. Our team will use standardized procedures to verify actual expenditures vs. planned expenditures. We will set up standard guidelines and procedures to ensure costs are properly classified as administrative, activity delivery, planning, or project costs.

Each month, we will provide the City with a financial status report. The report covers the following items:

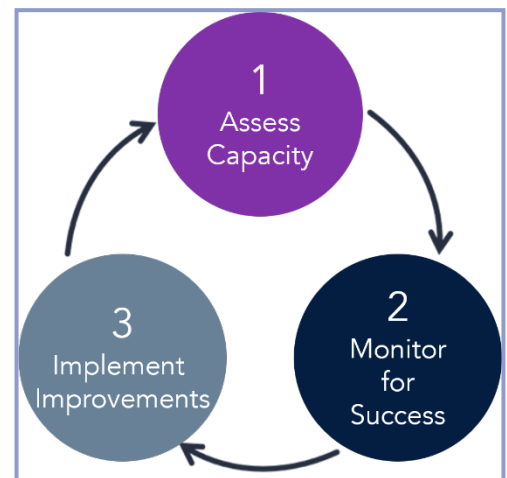
- ▶ Actual expenditures vs. planned expenditures
- ▶ Budget burn rates (per program)
- ▶ Costs per beneficiary
- ▶ Costs per category (administrative, activity delivery, planning, project)
- ▶ Expenditure trends
- ▶ Projections for future spending

### Monitoring and Execution of Plan

Carrying out each initiative outlined in the City’s Action Plan will require effort at multiple levels. Promoting empowerment across the City’s departments will lead to more hands being involved in the recovery funds process, which can in turn lead to compliance risks.

However, we will support the City by monitoring programs, plans, and applicants for any non-compliance issues, and we will address each issue prior to its escalation. Monitoring begins with an assessment of capacity and risk. We understand the City may have an established monitoring division, as well as existing policies and procedures for the monitoring process.

If requested, our team will support the City by developing or adjusting policies, procedures, and templates that are designed to assess the



**Figure 5:** Steps involved in a successful Action Plan

ability of an entity to carry out program activities, as well as the risks that are associated with each activity. A capacity assessment uses an entity's financial capacity, internal controls, and implementation abilities to gauge their ability to execute projects and programs. We will conduct capacity assessments to identify gaps, training opportunities, and inherent risks.

Our monitoring approach focuses on efficiency by combining on-site, virtual, and desktop reviews. Monitoring efforts will focus on identifying program successes and opportunities for improvement. After each monitoring effort, we will prepare reports on findings of the monitoring effort - including suggested improvements and potential corrective actions. We will review adherence to established procedures to prevent fraud, waste, abuse, and the mismanagement of funds.

To promote the program's success, Ms. Bertone will maintain a monitoring log to track issues, decision points, risk mitigation strategies, and perceived risks that may affect decision making. Lessons learned will be shared with all stakeholders, and we will make sure each program is modified based on those lessons.

If a monitoring visit or appointment is scheduled by an oversight agency, we will develop collateral materials, presentations, and supporting documentation to safeguard the City against any potential compliance issues.

## Project Closeout

Our team designs projects and programs with the end in mind. We have the ability and experience to provide exemplary project management services and will be responsible for preparing and ensuring that all closeout paperwork, information, and data is properly accounted for and stored throughout the life of the project. We understand that preparation for an error-free closeout starts at the beginning of every project.

We have extensive experience in monitoring and compliance for several federal funding streams, including HUD and the DEO, and we will apply that knowledge when supporting the City in the development of project closeout checklists and procedures. As each application approaches closeout, we will perform a comprehensive compliance review and reconciliation to ensure that all required information and documentation has been properly catalogued in accordance with HUD, DEO, and State standards.

When all applications have been closed, our team will support the City by providing final program closeout documentation that complies with applicable federal closeout requirements. After program closeout, our project management team will assist the City in conducting after action reviews, documenting lessons learned and best practices, and archiving organizational process assets like checklists and SOPs.

**Personnel**

# Martin Altman, PMP

Principal



## Technical Expertise

CDBG-DR Housing  
CDBG-DR Policy  
FEMA Public Assistance  
Strategic Planning  
Project Management

## Years of Experience

35 Years

## Education

B.S., Fire Protection  
Engineering, University of  
Maryland

## Certifications

- Project Management Institute/Program Management Professional
- FEMA PA Operations 1 & 2
- Incident Command System (100, 200, 300, 400, 700)
- HAZUS (Flood, Hurricane and DMA 2000 Risk Assessment)
- Coastal Management for Practitioners
- Hazard Management
- ESRI ArcGIS
- HSEEP
- FEMA Benefit Cost Analysis
- Process Improvement
- Advanced Facilitation
- Mitigation eGrants for Sub-Grantee (IS-30)
- Mitigation eGrants for Grantee (IS-31)
- Cost Estimating Format (E-480)

## Skills

- Spanish Level, C2 (Proficient)



## Professional Profile

Mr. Altman has more than 35 years of leadership experience, and has managed and implemented disaster planning and recovery program management for public and private sector clients. Currently, he is Metric's Vice President of Emergency Management and Long-Term Recovery. Mr. Altman has in-depth expertise in all phases of disaster management, including planning, preparedness, hazard mitigation, response and recovery, grant administration and management, post-disaster redevelopment planning, audit compliance, process improvements, quality assurance, and resiliency planning. He served as the FEMA Region VII Project Officer and Closeout Specialist for Kansas City, Missouri, and he was later appointed the FEMA Public Assistance Infrastructure Branch Director for the Florida Long Term Recovery Office, where he managed the FEMA PA Program. He oversaw more than 200 staff working on Project Worksheet development, the closeout of nine federally declared disasters, and over 4,000 applications - resulting in the recovery of more than \$16 billion. He has worked 60+ presidentially declared disasters and has served in many leadership and technical support roles. Prior to his time with FEMA, he gained emergency management experience through the fire services, where he served for 30 years. He also owned and managed an environmental and hazardous materials/ emergency response business.

## Experience

**Principal: Disaster Related Recovery Services / Grant Program Services (2017-2022), Pasco County, Florida:** Metric was selected for a five-year contract to provide disaster recovery and Hazard Mitigation Consulting Services. Since then, we have served as a FEMA PA and HMGP fiscal recovery consultant for Hurricanes Hermine and Irma, and the COVID-19 pandemic. We are responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, centralized data and reporting, effective quality-management protocols, and reviewing and improving procedures, and reimbursements and financial management. We provide preliminary disaster assessment assistance, training, and expertise to assess and evaluate the scope of the disaster damage - assisting with the retrieval and organization of project expenditures to ensure compliance with documentation requirements and resolution of Project Worksheet-related problems for eligibility reviews. Metric facilitates the formulation of Project Worksheets, data analysis, expense validation, and cost estimate reconciliations. This includes complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to respond, administer, organize, and monitor federally funded disaster recovery grants within Pasco County.

**Principal: SPARK Grant Management Support, Neosho County, Kansas:** Metric provided Neosho County with comprehensive grant management, program management, and cost recovery services. The work included a community needs assessment, strategic planning, program design and implementation, training, case management, and project closeout. Metric actively engaged with the community to identify and apply for additional funds and to implement strategies for a holistic recovery effort, and this approach led to Neosho County securing nearly \$1 million in FEMA PA assistance funding to supplement COVID-19 recovery efforts funded by the U.S. Treasury Coronavirus Relief Fund (CRF) grant. Metric collaborated with local non-profit groups to ensure that Neosho County met the needs of their residents, small businesses, and community organizations. It was one of the state's most successful housing support grant programs, and Neosho County is now cited as one of Kansas' grant management leaders.

**Principal: COVID-19 SPARK Grant Management Support, Finney County, Kansas:** Kansas' Governor issued an emergency declaration and authorized state resources and personnel to assist with the pandemic's response and recovery through Strengthening People and Revitalizing Kansas (SPARK) grant funds. Metric was retained by Finney County to support grant management and writing for COVID-19 related reimbursements aimed at increasing resiliency by improving systems that support housing, government access, and public infrastructure. Metric provides Finney County with comprehensive grant management and cost recovery services that cover strategic planning, FEMA PA, program implementation, and technical assistance and training. Metric is managing a \$10.9M grant program. Metric wrote a grant funding request for \$1.8M in state grants, and launched four separate grant programs.



# Juliann Bertone

Project Manager



## Technical Expertise

Project Management  
Contract Management  
CDBG-DR Policy  
HUD Housing Counseling  
Subrecipient Management  
Financial Controls  
Budget Development  
Stakeholder Engagement

## Years of Experience

10 Years

## Education

M.A., Global Leadership & Sustainable Development, Hawaii Pacific University  
B.S., Integrated Marketing Communications, Ithaca College

## Certifications

- CDPHE Project Management Essentials
- CDPHE Behavioral Health for Spokespersons Training
- FEMA Introduction to ICS for Operational First Responders
- FEMA National Incident Management System
- FEMA Joint Information Center / Joint Information System
- FEMA Basic Public Information Officer Awareness
- FEMA Social Media in Emergency Management, Emergency Support Function 15
- FEMA External Affairs

## Professional Profile

Ms. Bertone has extensive experience in HUD's Community Development Block Grant Program and in developing and executing federally funded programs. She is a quality improvement project leader who plans and organizes projects, meetings and presentations, creatively collaborates with partners in government, non-profit, for profit, and academic settings to enhance project skill sets, conducts data collection and specializes in data driven reports, and seamlessly manages goals, details and scheduling. Ms. Bertone is well-versed in training and technical assistance, subrecipient management, program design, and program compliance. With demonstrated subject matter expertise in public health and comprehensive disaster recovery, she is well-equipped to manage a broad range of disasters. Overall, Ms. Bertone offers unique experience in stakeholder engagement and the delivery of community-driven solutions.

## Experience

### **07/2020 – 06/2021: Associate Program Manager | COVID-19 SPARK Grant Management Support, Finney County, Kansas:**

In March 2020, the COVID-19 pandemic was declared a major disaster throughout the U.S. Later that month, Kansas' Governor (Laura Kelly) issued an emergency declaration and authorized the use of state resources and personnel to assist with the pandemic's response and recovery operations through the use of Strengthening People and Revitalizing Kansas (SPARK) grant funds. The allocation of SPARK grant funds opened the door for reimbursement for all eligible public assistance applicants for the County - including nearly 37,000 residents. Metric was retained by Finney County to support grant management and writing for COVID-19 related reimbursements aimed at increasing resiliency by improving the systems that support housing, government access, and public infrastructure. Metric provides Finney County with comprehensive grant management and cost recovery services that cover strategic planning, FEMA PA cost recovery, program implementation support, and technical assistance and training. The strategic planning aspect of the contract covers how to properly utilize different sources of funding, including the State's SPARK grant. The FEMA PA cost recovery portion covers FEMA cost recovery and project application training for Finney County staff. Overall, Metric is managing a grant program that includes \$10.9 million in funding. Metric wrote a grant funding request for \$1.8 million in new state grants, and launched four separate grant programs.

### **07/2020 – 06/2021: Associate Program Manager | SPARK Grant Management Support, Neosho County, Kansas:**

Metric provided Neosho County with comprehensive grant management, program management, and cost recovery services. The work included a community needs assessment, strategic planning, program design and implementation, training, case management, and project closeout. Metric actively engaged with the community to identify and apply for additional funds and to implement strategies for a holistic recovery effort, and this approach led to Neosho County securing nearly \$1 million in FEMA PA assistance funding to supplement COVID-19 recovery efforts funded by the U.S. Treasury Coronavirus Relief Fund (CRF) grant. Metric collaborated with local non-profit groups to ensure that Neosho County met the needs of their residents, small businesses, and community organizations. Metric's comprehensive approach allowed Neosho County's CRF dollars to be stretched, as Neosho County leveraged other grant programs for the items they could fund. It was one of the state's most successful housing support grant programs, and Neosho County is now cited as one of Kansas' grant management leaders.

### **05/2022 – Present: Project Manager: Home Investment Partnerships Program – American Rescue Plan (HOME-ARP) Consultation Services Contract, City of Columbus, Ohio:**

Metric was selected by the City of Columbus, Ohio to provide grant consultation services for the City's \$16 million allocation of HOME-ARP funding. The allocated funds are intended to reduce homelessness and increase housing stability across the country. Our team created a detailed project work plan to ensure the creation of a compliant and comprehensive funding Allocation Plan. Based on this plan, we designed and implemented stakeholder engagement strategies, including an online survey and in-person input meeting. With the data compiled, the Metric team assisted the city in the required consultation services report for the Allocation Plan.

# Justin Cauley

Data Manager



## Technical Expertise

CDBG-DR Policy  
FEMA Public Assistance  
Vendor Management  
Data Analysis  
Grant Management  
Recovery Management

## Years of Experience

8 Years

## Education

B.S. English, Troy State  
University

## Certifications

- IS-00029 – Public Information Officer Awareness
- IS-00030.a – Mitigation eGrants System
- IS 00100.b – Introduction to Incident Command System
- IS00393.a – Introduction to Hazard Mitigation
- IS00453 – Introduction to Homeland Security Planning
- IS00634 – Introduction to FEMA's Public Assistance Program
- IS00700.a – National Incident Management System (NIMS)

## Professional Profile

Mr. Cauley has more than eight years of disaster recovery experience. He has supported disaster recovery projects in the states of Florida, Colorado, South Carolina, Texas, New York, Ohio, Rhode Island, Kansas, and the Commonwealth of Puerto Rico. His responsibilities have included disaster case management, debris management, grant management, and compliance monitoring and implementation. Mr. Cauley has provided FEMA PA grant management services to Larimer County, Colorado, and he was deployed to South Carolina following the February 2014 Severe Ice Storm, where he assisted with field inspection and verification. He served as a Disaster Case Manager Supervisor and provided comprehensive mobility counseling and disaster case management services to eligible homeowners under HUD's CDBG-DR Program within the Deep East Texas Council of Governments and Liberty County, Texas. In that role, he worked with low to moderate income homeowners, the Texas General Land Office, real estate agents, subrecipients and their legal teams, insurance agencies, title companies, gas/electric companies, builders, and inspectors. Overall, he ensured all parties worked together in a timely manner to successfully assist applicants while complying with program guidelines that were set forth by HUD and the Texas General Land Office.

## Experience

### 03/2016 – 08/2018: (CDBG-DR) New York Rising – Governor's Office of Storm Recovery:

Mr. Cauley served as case management lead, and was responsible for overseeing a team tasked with management of more than 1,400 applications to the Small Rental Properties Program, the Affordable Rental Program, and the Interim Mortgage Assistance Program funded by HUD CDBG-DR funds appropriated by the Disaster Relief Appropriations Act, 2013 (Pub. L. 113-2). In this position, he:

- Facilitated intake of applications in accordance with established protocols for handling sensitive information.
- Provided technical assistance on topics including program eligibility, funding requirements, and interim mortgage assistance for temporarily displaced homeowners.
- Drafted and implemented policies for QA/QC of applicant case files.
- Led efforts to conduct duplication of benefits reviews for over 1,400 applicant case files.
- Conducted weekly performance and production reviews with program staff.
- Championed implementation of NY's Interim Mortgage Assistance program, providing compliance expertise and process development.

### 07/2020 – Present: Process Engineer: COVID-19 SPARK Grant Management Support, Finney County, Kansas:

Kansas' Governor issued an emergency declaration and authorized the use of state resources and personnel to assist with the COVID-19 response and recovery operations through the use of Strengthening People and Revitalizing Kansas (SPARK) grant funds. The allocation of SPARK grant funds opened the door for reimbursement for all eligible public assistance applicants for the County - including nearly 37,000 residents. Metric was retained by Finney County to support grant management and writing for COVID-19 related reimbursements aimed at increasing resiliency by improving the systems that support housing, government access, and public infrastructure. Metric provides Finney County with comprehensive grant management and cost recovery services that cover strategic planning, FEMA PA cost recovery, program implementation support, and technical assistance and training. Metric is managing a grant program that includes \$10.9 million in funding. Additionally, Metric wrote a \$1.8M grant funding request and launched four grant programs.

**02/2013 – 03/2016: Mobility Counselor: (CDBG-DR) Program (HOP) – Texas General Land Office:** Justin served as a Mobility Counselor responsible for providing relocation support services to eligible homeowners under the HUD CDBG-DR funded Homeowner Opportunity Program (HOP) within the Houston-Galveston Area Council of Government (H-GAC), Galveston County, and City of Galveston, Texas. HOP was a Disaster Recovery Housing Program through which income-qualified applicants living in FEMA-designated "High Risk" areas or areas of high minority and/or poverty concentration may elect to rehabilitate or reconstruct their existing home or relocate to a safer and higher opportunity area. This program involved relocation counseling, and the provision of licensed real estate professionals to explain the options and choices available while encouraging housing choice.

# Emily Prestenbach

Grant Consultant



## Technical Expertise

Force Account Labor  
Cost Estimating  
Project Worksheet Review  
Grant Management  
Data Analysis  
Closeout Reconciliation

## Years of Experience

6 Years

## Education

BS, Business Administration,  
Nicholls State University  
(2022)

## Certifications

- FEMA IS-100
- Excel for Accounting and Finance Professionals, 2021
- IS-0230.e: Fundamentals of Emergency Management
- IS-276.a: Benefit-Cost Analysis Fundamentals
- IS-01000: Public Assistance Program and Eligibility
- IS-1001: The Public Assistance Delivery Model Orientation
- IS-1002 FEMA Grants Portal
- IS-1005: Public Assistance Alternative Procedures
- IS-1006: Disaster Damage and Developing Project Files
- IS-1007: Detailed Damage Description and Dimensions
- IS-1008: Scope of Work Development

## Professional Profile

Ms. Prestenbach has six years of experience as a Senior Recovery Grants/Closeout Specialist in the FEMA PA Program. As a Disaster Recovery Analyst, she has experience manipulating data and finding creative ways to gain insight from raw data. She has a background in designing and developing relational databases and provides financial accounting reconciliation guidance to clients during the grant closeout process. She is an analytical, detail-oriented, and accomplished data professional with a record of accomplishment of success in collecting, analyzing, and improving business data to enhance solutions.

## Experience

**Lead Senior Consultant: Home Investment Partnerships Program – American Rescue Plan (HOME-ARP) Consulting Services, Franklin County, Ohio:** Metric is working with Franklin County, Ohio to develop a HOME-ARP Allocation Plan, ensuring the creation of a plan that best serves the Franklin County community. Tasks include developing an Allocation Plan schedule, conducting the required agency and service provider consultation process, developing the Allocation Plan in compliance with HOME-ARP regulations, conducting public participation, and assisting the County in the submission of the final Allocation Plan to HUD.

**Lead Senior Consultant: Home Investment Partnerships Program – American Rescue Plan (HOME-ARP) Consultation Services Contract, City of Columbus, Ohio:** Metric was selected by the City of Columbus, Ohio to provide grant consultation services for the City's \$16 million allocation of HOME-ARP funding. The allocated funds are intended to reduce homelessness and increase housing stability across the country. Metric's team created a detailed project work plan to ensure the creation of a compliant and comprehensive funding Allocation Plan. Based on the plan, Metric designed and implemented stakeholder engagement strategies, including an online survey and in-person input meeting. With the data compiled, Metric assisted with the required consultation services report for the Allocation Plan.

**04/2022 – Present: | Grant Management Project (CDBG), Terrebonne Parish Consolidated Government, Louisiana (Sub to CSRS):** As a subconsultant to CSRS, our Team was selected by Louisiana's Terrebonne Parish Consolidated Government for the Grant Management and Administrative Services For HUD, FEMA and Other Federally Funded Programs contract. MCL will support CSRS by providing program management, grant and project management for disaster recovery funding, planning advisory services, grant writing, reimbursement and closeout activities, compliance maintenance, and guidance for several government aid programs.

**TWO #1 - Provide outreach services as directed by CSRS**

**TWO #1 - Identify unmet needs that fit program requirements and develop a list of possible projects that meet policy guidelines.**

## Prior Work Experience

**2016 – 2022: Disaster Recovery Analyst: PSEG/LIPA, ICF:** Ms. Prestenbach compiled all supporting documentation and reconciliation of project costs for work that has been completed. She develops spreadsheets for reconciling financial records and catalogs supporting documentation in proper files for final reconciliation. She was required to communicate with client contractors and field staff for missing documentation. By working with the Closeout Financial Grants Manager, she processes all documentation to ensure accuracy for the development of final reconciliation of closeout packages and audits. She assesses project's work status, costs, and supporting documentation against the actual Scope of Work to reconcile estimated project costs with actual costs of completed work.

**08/2022 – 11/2022: Senior Recovery Grants / Closeout Specialist: Lane Electric, ICF:** Ms. Prestenbach compiled all supporting documentation and reconciliation of project costs for work that had been completed for the 2020 Wildfires that impacted the State of Oregon. She develops spreadsheets for reconciling financial records and catalogs supporting documentation in proper files for final reconciliation. She was required to communicate with client contractors and field staff for missing documentation. By working with the Closeout Financial Grants Manager and directly with Lane Electric financial department, she processes all documentation to ensure accuracy for the development of final reconciliation of closeout

### Certifications (Cont.)

- IS-1009: Conditions of the Public Assistance Grant
- IS-1010: Emergency Protective Measures
- IS-1012: Direct Administrative Costs
- IS-1013: Costing - Estimates and Cost Estimating Format
- IS-1014: Integrating 406 Mitigation Considerations into Your Public Assistance Grant
- IS-1020: Public Assistance Donated Resources
- IS-01023 Electrical Systems Considerations
- IS-2900.a: National Disaster Recovery Framework (NDRF) Overview

packages and audits. She assesses project's work status, costs, and supporting documentation against the actual Scope of Work to reconcile estimated project costs with actual costs of completed work.

**09/2022 – 11/2022: Disaster Recovery Analyst: Richmond University Medical Center, ICF:** Ms. Prestenbach worked with client to compile all supporting documentation and reconciliation of project costs for work that was completed. She uploaded all the supporting documentation into FEMA's Grants Portal for FEMA review and obligations of funds. She developed spreadsheets for reconciling financial records and catalogs supporting documentation in proper files for final reconciliation.

**05/2016 – 10/2016: Project Specialist: City of Palm Coast, FL, DMS:** Ms. Prestenbach was responsible for the development of all the Force Account, Labor, Equipment and Materials to support the development of Project worksheets for the city. Ms. Prestenbach worked very closely with all the city's different departments to gather all the required source documentation to submit to FEMA.

# Jeffery LeMoine

Grant Consultant



## Technical Expertise

Recovery Management  
Financial Management  
Grant Management &  
Accounting  
Debris Monitoring  
Quality Assurance  
Data Analysis

## Years of Experience

20 Years

## Education

BS, Geography/Urban  
Planning, Frostburg State  
(1997)

## Certifications

- Introduction to Hazard Mitigation, 2019
- Introduction to FEMA's Public Assistance Program, 2019
- Benefit-Cost Analysis Fundamentals, 2019
- Project Management Framework Overview, 2019
- E & P Field Safety Courses, 2019, 2020
- Public Assistance Delivery Model Orientation, 2020
- Grants Portal-Transparency at Every Step, 2020
- National Disaster Recovery Framework, 2020
- Building Resilient Infrastructure and Communities (BRIC) Summer Engagement Series, 2020

## Professional Profile

Mr. LeMoine has over 20 years of leadership experience, including time spent developing and managing inventory data processes to ensure proper inventory and staffing needs were met. He has also been a lead Critical Infrastructure Field Inspector and provided damage assessments, project formulation, and the implementation of overhead drone technology to inspect infrastructure. He is adept at providing technical data geared toward mitigation strategies to increase resiliency and strengthen critical infrastructure, and he has developed mitigation and resilience strategies to meet changing community lifeline criteria.

## Experience

**04/2022 – Present: PA/Technical Specialist: Grant Management Project (CDBG), Terrebonne Parish Consolidated Government, Louisiana (Sub to CSRS):** As a subconsultant to CSRS, our Team was selected by Louisiana's Terrebonne Parish Consolidated Government for the Grant Management and Administrative Services For HUD, FEMA and Other Federally Funded Programs contract. MCL will support CSRS by providing program management, grant and project management for disaster recovery funding, planning advisory services, grant writing, reimbursement and closeout activities, compliance maintenance, and guidance for several government aid programs.

TWO #1 - Provide outreach services as directed by CSRS

TWO #1 - Identify unmet needs that fit program requirements and develop a list of possible projects that meet policy guidelines.

## Prior Work Experience

**August 2021 – February 2022: UAS (Drone) Inspector: Louisiana State Government, ICF:** UAS Pilot Inspector for Louisiana State Government and Schools. Utilizing drone technology to quickly and safely assess damaged areas from Hurricane Ida. This consists of collecting high resolution drone photos and putting data into reports to easily assess damage for insurance reimbursement.

**January 2020 – February 2022: Technical Inspector: Lane Electric Cooperative, ICF:** Lead Critical Infrastructure Inspector for Lane Electric Cooperative. His responsibilities include damage assessments, project formulation and the implementation of overhead drone technology inspections of infrastructure with the ICF Drone Team. He also provides technical data for the development of mitigation strategies to strengthen critical infrastructure to be more resilient against future damage, aligning resiliency strategies to meet community lifeline criteria.

**June 2019 – February 2022: Field Site Inspector Lead: Long Island PSEG Assistance Program, ICF:** Field Site Inspector For PSEG-LI conducting QA/QC for the scope of work being completed on the Overhead Mainline Distribution System across Long Island NY. This consists of field inspection of over 1,025 miles of storm hardening of the system to build resiliency and redundancy to ensure that all work has been completed to meet program compliance.

# DARRYL MARSHALL

## Senior Grant Consultant



### PROFILE

Mr. Darryl Marshall has been working disaster recovery and response since 2007. He began his disaster recovery career with GOHSEP, supporting the Hazard Mitigation Grant Program (HMGP), CDBG and The Road Home Program. Mr. Marshall has deployed to numerous disasters and honed his skills working with Catholic Charities and Long-Term Recovery programs. Most recently, Darryl served as a Program Delivery Manager (PDMG) working in Grant Manager and has performed closeouts on various applicants. Darryl is well versed in FEMA's laws, regulations, and policies in the PAPPG and 44CFR.

Mr. Marshall has exceptional computer skills and written and oral communication skills. He is accomplished in organizing financial data from internal and external resources and producing reports, as necessary. Darryl is proficient in Microsoft Office, and is predominate in the use of Excel, developing and building spreadsheet reports, optimizing its' functions and capabilities.

### EXPERTISE & CERTIFICATIONS

- Grants Manager/Grants Portal
- FEMA PA Program Delivery Manager
- FEMA PA Site Inspector
- FEMA PA/IA Policy and Guidelines
- FEMA IA Policy and Guidelines
- Community Disaster Block Program
- Financial Management
- Long-Term Recovery
- Hazard Mitigation
- Project Management
- Worltrac
- Metastorm

### YEARS OF EXPERIENCE

- 16+ years of experience

### EDUCATION

- B.S. Electronics Engineering Technology

### RELEVANT PROJECT EXPERIENCE

#### **AECOM Recovery, Program Delivery Manager, 2018 – 2020**

- DR-4332-TX Hurricane Harvey
- Apply PA knowledge and skills in recovery and mitigation issues at the Branch II Texas Recovery Office. Coordinate, guide and assist in activities to ensure continuity of essential functions.
- Manage recovery projects of State and Territorial governments, local, Tribal and Private nonprofit organizations.
- Conduct recovery scoping meetings to document damages and obtain necessary documentation.
- Coordinate with Hazard Mitigation, EHP, site inspectors and State Recovery Officers to ensure PA policy followed.
- Experienced in formulating projects, ensuring that all damages are identified.
- Maintain files and develop Program Delivery Plans to follow up accordingly.
- Draft Damage Inventory lists, capturing all disaster – related damages.
- Order Site Inspections of damaged sites not yet repaired and review DDDs.
- Process all into Grants Manager

#### **Catholic Charities, Disaster Case Manager Supervisor, 2016 – 2018**

- Louisiana Flood 2016
- Supervise disaster Case Management operations for assigned area. Supervise team, coordinate with State DCM Program Manager, local Long-Term Recovery groups and local communities, and the development and implementation of standard documentation practices and procedures for the identification of resources for individuals and families.
- Obtain funds for disaster survivors. Ensure accurate documenting.
- Completes all required statistical, fiscal and narrative reporting activities to the State, FEMA, Agency and others as requested.
- Compile and analyze data, report recommendations.
- Prepare weekly reports and financial data.
- Develop and maintain working relationships with other community-based organizations for reasons of advocacy, education, resource development and public relations

#### **Governor's Office of Homeland Security (GOHSEP), State Applicant Liaison, 2015 – 2016**

- DR-1603-1607-LA Hurricane Katrina and Rita
- Provide technical assistance to Applicants on the full spectrum of FEMA HMA programs.
- Develop local knowledge of all mitigation programs. Work with local governments, state agencies and private nonprofit organizations to provide visibility and establish confidence in programs.
- Assist potential Applicants with the Hazard Mitigation Grant Program (HMGP) process. Assist HM officials with briefings

# DARRYL MARSHALL

## Senior Grant Consultant



### **Providence Engineering Office of Community Development, Disaster Recovery Analyst, 2014 – 2015**

- DR-1603-1607-LA Hurricanes Katrina and Rita
- Maintain knowledge with CDBG disaster requirements relative to homeowner participation and construction work.
- Review, evaluate and provide analysis to management on Grantees' applications for recovery funding.
- Research homeowner issues and coordinates with senior staff to resolve barriers to applicant participation in the program.
- Complete reviews for compliance, advise team on homeowner eligibility to participate. Review files, to ensure complete and accurate. QA/QC for payments, duplication, fraud, waste, and abuse of funds. Prepare grant files for closeout

### **Innovation Emergency Management (IEM), HMGP Field Team Specialist, 2014 – 2015**

- DR-4085-NY Hurricane Sandy
- Work with NY State officials and government administrators on hazard mitigation options and grant administration services related to HMGP.
- Demonstrate knowledge and understanding and application of 404 HMGP as outlined in Stafford Act, 44 CFR and FEMA Policy and regulations.

### **Procter and Gamble, Shipment / Production Planner, 2011 – 2013**

- Utilize SAP for supply chain management to help ensure delivery of order to customers, improve responsiveness and control costs.
- Work in the logistics execution functionality of SAP covering the areas of warehouse management, inbound, receiving and shipping processing.
- Maintain all master data, system configuration and transactions to complete the "plan to produce" process which is inclusive of long and short term planning, material requirement planning (MRP) and insuring all data is maintained to execute a produce to demand strategy.
- Coordinator with forwarding companies to schedule outbound / inbound shipments.
- Prioritize and update status of shipment as needed.

### **Hammerman & Gainer, Disaster Recovery Case Manager, 2009 – 2011**

- Process applications through the Hazard Mitigation Grant Program (HMGP) for applicants receiving CDBG, Elevation grant, and IMM.
- Utilize software such as JIRA, eGrants, ePortal, WorlTrac, and Metastorm to process grants and grant writing for HMGP.
- Collect all necessary documentation from homeowners to submit for approval by GOHSEP and FEMA.
- Collect all data needed to determine homeowner interest via Excel spreadsheet.
- Determine status of FEMA clearance, perform continued eligibility determinations, potential payments, internal appeals, homeowner consultations, quality assurance, mass mailings and subsequent data entry, project completion, database management, and closeout.
- Train case managers on new policies and procedures via PowerPoint presentation

### **Quadel, Disaster Recovery, Hurricanes Katrina and Rita, Advisor, 2007 – 2009**

- Assist families in securing housing and financial assistance by serving as liaison between The Road Home program applicants and the Title company representatives.
- Help families understand and complete required documentation.
- Conduct face-to face meetings to describe program options and offer technical assistance to the family in choosing the best program option for them (rebuild, replace, or buy-out).
- Perform preliminary and final calculations of all options and provide the family with a clear and concise presentation of the options

### **DISASTER/CDBG LIST:**

- Disasters since 2007: CDBG, HUD, HMGP, Road Home Program, Long-Term Recovery
- DR-1603-LA, DR-1607-LA 2009-2011, CDBG Specialist. Reference: George Hart 504.679.1888 (Hammerman and Gainer)
- DR-1603-LA, DR-1607-LA 2014-2015, CDBG Specialist. Reference: Kimberly Lundy 225.802.3544 (Office of Community Development)

# JENNIFER CATALANO-GIBLIANT

## Senior Grant Consultant



### PROFILE

Ms. Gagliant has directed several programs and start-up efforts for disaster recovery in the State of Louisiana. From the initial start-up phase of the Road Home Program through the close out phase of the Homeowners Assistance Program and has more than 13 years of experience managing large scale disaster projects for federal government, state government and Fortune 500 clients. She has worked throughout the southeast US performing in diverse function areas of management, legal, real estate, mortgage lending, disaster recovery, and HUD Section 504 Training and CDBG and FEMA policy. The dedication and commitment as Director of Operations and Senior Manager of Applicant Relations was essential in managing cohesive teams, to monitor 130,050 homeowners receive over \$9.5B dollars in CDBG-DR funds. Ms. Gagliant worked with Louisiana's Director of Homeowner Programs to develop and implement comprehensive policies and procedures for a Low-to-Moderate Income Housing Eligibility, Auditing and Monitoring Program as well as an all-encompassing Disaster Recovery Program for OCD-DRU, including the Homeowner Assistance Program (HAP) and Hazard Mitigation Grant Program (HMGP) for the State of Louisiana.

### EXPERTISE & CERTIFICATIONS

- HUD Paralegal
- Auditor –The Office of Financial Institutions (OFI)
- FEMA Certified and Security Clearance
- FEMA IA Training
- HUD DRGR System of Record Training
- HUD/CDBG Grants & Policy
- Project Management
- Program Management
- Outreach Coordinator
- Client Interface
- Section 504 Coordinator
- Hazard Mitigation Measures
- CDBG Program Design
- HUD/CDBG Program Policy
- FEMA Program Policy
- Mortgage Loan Origination
- Xactmate
- Notarial Secretary
- Comprehensive Insurance Adjusting

### YEARS OF EXPERIENCE

- 13+ years of experience

### EDUCATION

- Texas School of Business, Houston, Texas, Certified and State Licensed Paralegal

### RELEVANT PROJECT EXPERIENCE

#### **Director of Operations, Homeowner Assistance Program (HAP), New Orleans and Baton Rouge, LA (2009-2018)**

- Served as Project Executive/Director of Operations/Special Needs Coordinator with operational responsibility for all Case Management, Call Center and Intake Specialists, Constituent Services Representatives, Outreach and Public Relations Teams under the Homeowner portion of one of the nation's largest hurricane disaster recovery efforts (HAP). A Professional "HUD Section 504" Community Outreach Leader, with 13 Years of CDBG-DR experience and 5 year of FEMA experience, implementing and managing hundreds of Outreach events, through The Road Home Program and The Housing Assistance Program, as well as managing external relationships and collaborations. A Section 504 Coordinator, developing, facilitating and training staff on disaster recovery programs and outreaches to assure compliance with the Americans with Disabilities Act (ADA), Sections 501 and 504 of the Rehabilitation Act of 1973, and other federal and state laws and regulations pertaining to persons with disabilities. Served as a point of contact to clients, and various other stakeholders including State and Federal agencies, the Housing of Urban Development (HUD) and non-profit advocacy groups. Ms. Gagliant provided management and key oversight encompassing several service areas, including, Project Operations, Auditing, Compliance & Monitoring, Development of Policies and Procedures, Training, Technical Presentations, Official Responses, and QA/QC.

#### **FEMA Project Liaison, APTIM, Baton Rouge, LA (2018)**

- Ms. Gagliant assisted in the close-out efforts of the Hazard Mitigation Grant Program (HMGP) and reported findings to the Office of Community Development. She drafted affidavits, scheduled appointments and met with applicants and contractors, to obtain statuses on the signed Promissory Notes, throughout the program.

#### **Senior Project Manager, ICF International, Baton Rouge, LA (2006-2009)**

- Ms. Gagliant began the initial start up phase of The Road Home Program. Her key responsibilities in implementing and managing a Disaster Recovery Program, include but are not limited to, the following:
  - Initial set up of a Housing Assistance Center,



# JENNIFER CATALANO-GIBLIANT

## Senior Grant Consultant



- Developed and implemented initial program policies, processes, and procedures; Standard Operating Procedures,
- Created schedules for multiple teams and developed metrics, goals and assignments for each team,
- Created and presented training materials for ongoing CDBG-DR funding initiatives; Elevation funding,
- Drafted letter correspondence to applicants, legislators and shareholders,
- Managed Call Center and Intake Specialists,
- Contributed to the development of the Audits, Monitoring and Eligibility Department, as well as, the design and delivery of training on departmental policies and procedures.
- Drafted, edited and prepared management and technical presentations supporting deliverables, and
- Researched in-depth, program policy, applicant timelines, and department procedures and developed several other funding proposals,
- Managed teams to monitor files that are 80% of Median Income Limits set by HUD to ensure CDBG Limits and CDBG Reporting Forms,
- Provided training of the Audit Review Procedures to the Legislative Auditors and the Office of Community Development Disaster Response staff, and
- Documented (reviewed) possible fraudulent applications by examining case files.

### **Office Manager / Loan Originator, FMC Mortgage Company, Mandeville / Metairie Locations, LA (1999-2005)**

- Served as Office Manager providing complete office management responsibilities for two office locations. Ms. Gagliant corresponded with Federal Lending Institutions by providing loan proposals and brokerage packages. Also, developed training materials for Mortgage Originators, Brokers, Real Estate Agents, Title Companies, HUD Housing Authority, and staff loan officers. Prepared and responded to Audit Findings by the Office of Financial Institution Mortgage Audits.
- Ms. Gagliant's extensive finance, earned value management, and customer services responsibilities was an invaluable asset to her success managing staff, office responsibilities and key oversight to successfully originating mortgage loans, as well as legal and/or title issues.
- She is a versatile manager with Investigation, Audit, Disaster Recovery, Legal, Title and Mortgage experience. She has an innate ability to motivate various teams to achieve high productivity goals, as well as portray the highest level of customer service and public relations.

# Qualifications

# 7. Qualifications

## CDBG Grant Administration Experience

Our grant management approach is backed by a foundational belief that no matter the funding stream, compliance is a key component to protecting the City's recovery dollars. As far as eligibility and project management, we will assist the City with HUD CDBG grant programs, and with any other funding streams that may be involved throughout the process. We have extensive experience in program design and policy development, vendor management, federal procurement, and grant closeout.

Our expertise enables us to anticipate and avoid significant issues, both pre- and post-program launch. We are familiar with the requirements of federal, state, and local funding and have assisted grantees during all phases of grant administration - from the development of Action Plans and unmet needs assessments through project closeout. We have supported our clients in efforts that have included:

- Planning - including needs assessments
- Action Plan writing and program design
- Policy development
- Eligibility and duplication of benefits reviews
- Regulatory coordination
- Construction management
- Project monitoring
- Case management
- Reimbursement services
- Payment reconciliation
- Procurement development and oversight
- Cross-cutting compliance
- External relations
- Stakeholder engagement
- Financial management

Our team also has strong, specific, and documented experience as a compliance expert with 2 CFR Part 200, EDA grant programs, and the administration of federally funded construction and non-construction projects. Further details on our project history are provided below.

## City of Columbus, Ohio | HOME-ARP Consultation Services

Metric was selected by the City of Columbus, Ohio to provide grant consultation services for the City's \$16 million allocation of HOME-ARP funding. As a HOME program participating jurisdiction, the City's allocated funds are intended to reduce homelessness and increase housing stability across the country. Metric's team created a detailed project work plan and a proposed project schedule that includes critical path milestone deadline dates, consultant personnel assigned to the project team, identified potential issues and corresponding risk mitigation steps, and a project task list that identifies the steps the consultant will take to accomplish the key objective of a compliant and comprehensive funding Allocation Plan.

Based on the Allocation Plan, Metric designed and implemented stakeholder engagement strategies, including an online survey and in-person input meeting. The team ensured a wide range of housing service providers were consulted, including but not limited to members of the City of Columbus and Franklin County Continuum of Care (CoC), homeless and domestic violence service providers, veterans groups, the public housing agency serving the City's geographic area (Columbus Metropolitan Housing Authority), public agencies that address

the needs of the qualifying populations, and both public/private organizations that address fair housing, civil rights, and the needs of persons with disabilities. With the data compiled, the Metric team assisted the City in the required consultation services report for the Allocation Plan.

Through extensive research and a thorough review of documentation provided by the City, the Metric team also created the required needs assessment and gap analysis report for the Allocation Plan. Metric's team continued to work with the City to complete the entirety of the Allocation Plan and the required public participation through HOME-ARP's March 31st, 2023, submission deadline. The City's plan was accepted by HUD on first submission.

## Franklin County, Ohio | HOME-ARP Consulting Services

Metric worked with Franklin County, Ohio to develop a HOME-ARP Allocation Plan in which the County was allocated over **3 million dollars**. Our team worked closely with County staff to make sure their needs were met every step of the way. We assisted the county by holding both in-person and virtual public participation meetings where we received feedback from stakeholders, service providers, and county residents in the community. This feedback was closely analyzed and used to formulate an allocation plan that would make the greatest impact on homelessness in Franklin County.

Other tasks performed included developing an Allocation Plan schedule, conducting the required agency and service provider consultation process, developing the Allocation Plan in compliance with all HOME-ARP regulations, conducting required public participation, and assisting the County in the submission of the final Allocation Plan to HUD.

Once the plan was created and approved by County staff and administration, Metric assisted further by completing HUD required forms needed for submission. Franklin County submitted their complete allocation plan to HUD by the submission deadline and were approved in April 2023. Post approval, Metric's team provided the County with all necessary closeout documents.

## Collier County | CDBG, HOME, ESG, CDBG-CV and EGS-CV HUD Grant Environmental Documentation

Metric conducts site-specific environmental reviews and prepares appropriate NEPA documentation. Our team begins by screening projects and determining the appropriate Classes of Action and level of required documentation. Our team then collects the necessary data through desktop and field evaluations and develops the associated NEPA checklists, maps and supporting documentation to demonstrate compliance with HUD requirements. Public involvement and notification are often required, and we then identify if the 8-step or 5-step processes are required and if so, we prepare necessary documentation for public notice.

There have been 16 Task Work Orders to date. Projects with potential for minor environmental impacts are categorically excluded and listed as exempt. Other projects have a greater potential for impacts as they result in real changes to the physical world, like exterior improvements to buildings or installing public infrastructure. If a project does not involve a change in land use or expansion of residential densities, it can often be categorically excluded under 24 CFR Part 58.5. Flood zones are a major concern in this region, and each project

requires coordination with the State Historic Preservation Officer to confirm there are no historic districts or buildings that may be affected.

## DeSoto County | Environmental Review of CDBG-MIT & CDBG-CV Funded Projects

Metric provides environmental reviews of current and anticipated HUD CDBG-MIT and CDBG-CV projects. Metric has conducted environmental assessments and tiered environmental reviews that satisfy all HUD requirements under 24 CFR Part 58, in accordance with all applicable laws and regulations on the federal, state, and local levels. Our team leads the development of the corresponding Environmental Review Records (ERRs). Metric oversees the environmental assessments of an array of potential impacts, including land development, community facilities, healthcare, social services, solid waste disposal, wastewater, water supply, public safety, parks, recreation, water resources, vegetation, wildlife, and more. Metric provides a comprehensive ERR for the pre-project environmental conditions, the anticipated environmental impact of the proposed activities, and any potential mitigation measures that may be needed to bring the project into environmental compliance.

### Office of Disaster Recovery, US Virgin Islands

Metric’s partner, ISC, was selected by the US Virgin Islands Office of Disaster Recovery to assist in the management of over \$8 billion in federal disaster assistance. Funding sources include FEMA's Public Assistance (PA) and Hazard Mitigation Grant Programs (HMGP), Federal Highway Administration Disaster Relief Program (FHWA-ER), HUD Community Development Block Grant – Disaster Recovery (CDBG-DR), and other federal recovery programs. ISC is assisting the ODR by maintaining compliance with federal regulations and ensuring that all federally funded projects are completed on time and within budget and scope.

The Office of Disaster Recovery implemented ISC’s Disaster Grant Management Tool software application to track, administer, and report federal disaster assistance grant funds for Hurricanes Irma, Maria, and COVID-19. This tool is being used by 44 federal agencies and has over 300 active users across the Island. Currently, ISC is managing over 1,500 FEMA Project Worksheets and recovery projects. ISC also created customized dashboard reports where they can provide real-time monitoring of all recovery projects.

### Other Relevant Previous Projects

Client, Location	Project Description	Dates
Finney County, Kansas	Metric delivered turn-key solutions for comprehensive management of COVID-19 recovery funding through the CRF grant, providing program design, implementation, and management services. We also guided the County in securing \$1.8 million through FEMA PA grants. We are currently assisting the County with the administration of their ARPA allocation. To date, our team has assisted over 100 households, 29 businesses, and 20 community organizations.	07/2020 - Present

**CDBG Grant Administration Services RFP #22-007**

Seward County, Kansas	Metric provides comprehensive management of COVID-19 recovery funding, including providing program design, implementation, and management services for the County's CRF grant, and administration of ARPA allocation.	07/2020 - Present
Saline County, Kansas	The Metric team is assisting Saline County in the disbursement of \$10.5 million in ARPA funding. We are currently managing the distribution of ARPA funding to subrecipients and have provided the County with a technology solution for tracking this process. We also performed a needs assessment to help determine the best usage of ARPA funds, and we provided program recommendations based on this assessment.	05/2021 - Present
Unified Government of Wyandotte County and Kansas City, Kansas	The Metric team was retained to assist the Unified Government in program formulation and disbursement of approximately \$32 million in ARPA funding.	09/2021 - Present
Livingston, Michigan	Metric was awarded a statewide cooperative contract to provide COVID-19 relief consulting services, with a focus on compliant and efficient administration of the state and local fiscal Recovery Fund, appropriated through ARPA.	06/2021 - Present
City of Fayetteville, North Carolina	The Metric team was asked to provide strategic advice to identify applicable uses for ARPA funds to maximize the City's ability to recover costs under various federal programs, including the FEMA PA Program, CRFs, and HHS/Centers for Disease Control and Prevention (CDC) grants. Initial tasks included the identification of negative economic impacts of COVID-19, public health workers who performed essential work during the pandemic, lost revenues, and opportunities to construct broadband infrastructure.	06/2021 - Present

Tab 8

**Client  
References**

## 8. Client References

Metric Consulting Client Name: DeSoto County Board of County Commissioners  
Address: 201 E. Oak Street | Arcadia, FL 34266  
Reference Name: Sara Walker | Public Information Officer & Grants Coordinator  
Phone: (863) 993-4800 x 344  
Contract Initiation and Completion Dates: 05/2022 - Present

Metric Consulting Client Name: Pasco County, Florida  
Address: 8731 Citizens Drive | New Port Richey, FL 34654  
Reference Name: Patrick W. Ballinger | Grants Coordinator  
Phone: (727) 847-2411 (ext. 8457)  
Contract Dates: 07/2017 - Present

ISC Client Name: US Virgin Islands (USVI) Office of Disaster Recovery (ODR)  
Address: 1000 King Street Suite No.6 Christiansted, VI 00820-4905  
Reference Name: Adrienne L. Williams | Director, Office of Disaster Recovery  
Phone: (340) 778-8135  
Contract Initiation and Completion Dates: 05/2022 - Present



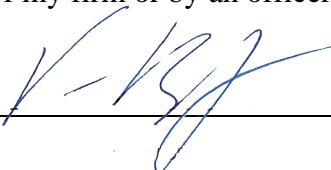
**Sworn Statements  
and Affidavits**

**ANTI-KICKBACK AFFIDAVIT**

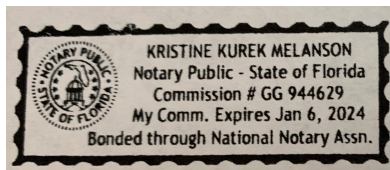
STATE OF Florida

COUNTY OF Miami-Dade County

I the undersigned hereby duly sworn, depose and say that no portion of the sum herein response will be paid to any employee 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: 

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [] online notarization, this 8th day of May, 2023, by Veronica Benitez, Psy.D President of Metric Consulting, Inc.



  
(Signature of Notary Public- State of Florida)

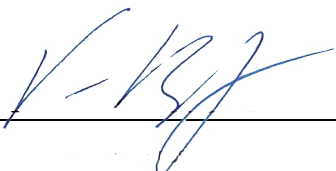
Kristine K. Melanson  
(Name of Notary Typed, Printed, or Stamped)

Personally Known X OR Produced Identification N/A  
Type of Identification Produced N/A

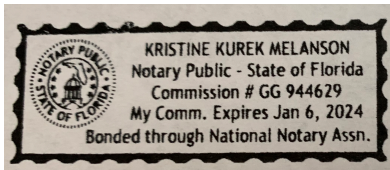
**NON-COLLUSION AFFIDAVIT**

STATE OF Florida  
COUNTY OF Miami-Dade County

I, the undersigned hereby 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.

BY: 

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [] online notarization, this 8th day of May, 2023, by Veronica Benitez, Psy.D  
President of Metric Consulting, LLC



  
(Signature of Notary Public- State of Florida)

Kristine K. Melanson  
(Name of Notary Typed, Printed, or Stamped)

Personally Known X OR Produced Identification N/A

Type of Identification Produced N/A

**SWORN STATEMENT PURSUANT TO SECTION 287.133(3)(A)**  
**FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS,

1. This sworn statement is submitted for Veronica Benitez, Psy. D, President  
(print individual's name and title)

by Metric Consulting, LLC  
(print name of entity submitting sworn statement)

whose business address is 13940 SW 136th Street, Suite 100, Miami,  
FL 33186

and (if applicable) its Federal Employer Identification Number (FEIN) is  
47-4413674

(if the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement): N/A

2. 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 of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "conviction" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. 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 agent who are active in the management of an

affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment of 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.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statute 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 a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement (indicate which statement applies).

  X   Neither the entity submitting this sworn statement, or any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

       The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

       The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list (attach a copy of the final order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH ONE (1) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER

31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES, FOR THE CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

*V. Benitez*  
(SIGNATURE)

May 8, 2023  
(DATE)

STATE OF Florida

COUNTY OF Miami-Dade County

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [] online notarization, this 8th day of May, 20 23, by Veronica Benitez, Psy. D President of Metric Consulting, LLC

*Kristine K. Melanson*  
(Signature of Notary Public- State of Florida)



Kristine K. Melanson  
(Name of Notary Typed, Printed, or Stamped)

Personally Known X OR Produced Identification N/A

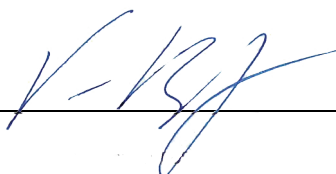
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**EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT**

STATE OF Florida

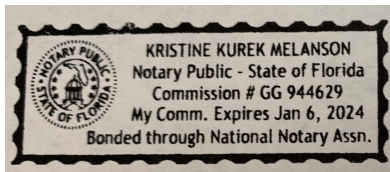
COUNTY OF Miami-Dade County

I, the undersigned hereby duly sworn, depose and say that the firm of Metric Consulting, LLC 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: 

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [] online notarization, this 8th day of May, 2023, by Veronica Benitez, Psy.D. President of Metric Consulting, LLC

  
(Signature of Notary Public – State of Florida)



Kristine K. Melanson  
(Signature of Notary Public – State of Florida)

Personally Known X OR Produced Identification N/A

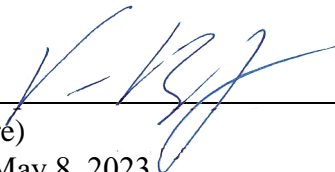
Type of Identification Produced N/A

**CONE OF SILENCE AFFIDAVIT**

Pursuant to City of Key West Code of Ordinances Section 2-773 (attached below)


STATE OF Florida  
COUNTY OF Miami-Dade County

I the undersigned hereby duly sworn depose and say that all owner(s), partners, officers, directors, employees and agents representing the firm of Metric Consulting, LLC have read and understand the limitations and procedures regarding communications concerning City of Key West issued competitive solicitations pursuant to City of Key West Ordinance Section 2-773 Cone of Silence (attached).

  
\_\_\_\_\_  
(signature)  
\_\_\_\_\_  
May 8, 2023  
\_\_\_\_\_  
(date)

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [] online notarization, this 8th day of May, 2023, by Veronica Benitez, Psy.D President of Metric Consulting, LLC



  
\_\_\_\_\_  
(Signature of Notary Public – State of Florida)  
Kristine K. Melanson  
\_\_\_\_\_  
(Signature of Notary Public – State of Florida)

Personally Known X OR Produced Identification N/A  
Type of Identification Produced N/A



**Sec. 2-773. Cone of Silence.**

- (a) *Definitions.* For purposes of this section, reference to one gender shall include the other, use of the plural shall include the singular, and use of the singular shall include the plural. The following definitions apply unless the context in which the word or phrase is used requires a different definition:
- (1) *Competitive solicitation* means a formal process by the City of Key West relating to the acquisition of goods or services, which process is intended to provide an equal and open opportunity to qualified persons and entities to be selected to provide the goods or services. Competitive solicitation shall include request for proposals ("RFP"), request for qualifications ("RFQ"), request for letters of interest ("RFLI"), invitation to bid ("ITB") or any other advertised solicitation.
  - (2) *Cone of silence* means a period of time during which there is a prohibition on communication regarding a particular competitive solicitation.
  - (3) *Evaluation or selection committee* means a group of persons appointed or designated by the city to evaluate, rank, select, or make a recommendation regarding a vendor or the vendor's response to the competitive solicitation. A member of such a committee shall be deemed a city official for the purposes of subsection (c) below.
  - (4) *Vendor* means a person or entity that has entered into or that desires to enter into a contract with the City of Key West or that seeks an award from the city to provide goods, perform a service, render an opinion or advice, or make a recommendation related to a competitive solicitation for compensation or other consideration.
  - (5) *Vendor's representative* means an owner, individual, employee, partner, officer, or member of the board of directors of a vendor, or a consultant, lobbyist, or actual or potential subcontractor or sub-consultant who acts at the behest of a vendor in communicating regarding a competitive solicitation.
- (b) *Prohibited communications.* A cone of silence shall be in effect during the course of a competitive solicitation and prohibit:
- (1) Any communication regarding a particular competitive solicitation between a potential vendor or vendor's representative and the city's administrative staff including, but not limited to, the city manager and his or her staff;
  - (2) Any communication regarding a particular competitive solicitation between a potential vendor or vendor's representative and the mayor, city commissioners, or their respective staff;
  - (3) Any communication regarding a particular competitive solicitation between a potential vendor or vendor's representative and any member of a city evaluation and/or selection committee therefore; and
  - (4) Any communication regarding a particular competitive solicitation between the mayor, city commissioners, or their respective staff, and a member of a city evaluation and/or selection committee therefore.
- (c) *Permitted communications.* Notwithstanding the foregoing, nothing contained herein shall prohibit:

- (1) Communication between members of the public who are not vendors or a vendor's representative and any city employee, official or member of the city commission;
  - (2) Communications in writing at any time with any city employee, official or member of the city commission, unless specifically prohibited by the applicable competitive solicitation.
    - (A) However, any written communication must be filed with the city clerk. Any city employee, official or member of the city commission receiving or making any written communication must immediately file it with the city clerk.
    - (B) The city clerk shall include all written communication as part of the agenda item when publishing information related to a particular competitive solicitation;
  - (3) Oral communications at duly noticed pre-bid conferences;
  - (4) Oral presentations before publicly noticed evaluation and/or selection committees;
  - (5) Contract discussions during any duly noticed public meeting;
  - (6) Public presentations made to the city commission or advisory body thereof during any duly noticed public meeting;
  - (7) Contract negotiations with city staff following the award of a competitive solicitation by the city commission; or
  - (8) Purchases exempt from the competitive process pursuant to [section 2-797](#) of these Code of Ordinances;
- (d) *Procedure.*
- (1) The cone of silence shall be imposed upon each competitive solicitation at the time of public notice of such solicitation as provided by [section 2-826](#) of this Code. Public notice of the cone of silence shall be included in the notice of the competitive solicitation. The city manager shall issue a written notice of the release of each competitive solicitation to the affected departments, with a copy thereof to each commission member, and shall include in any public solicitation for goods and services a statement disclosing the requirements of this ordinance.
  - (2) The cone of silence shall terminate at the time the city commission or other authorized body makes final award or gives final approval of a contract, rejects all bids or responses to the competitive solicitation or takes other action which ends the competitive solicitation.
  - (3) Any city employee, official or member of the city commission that is approached concerning a competitive solicitation while the cone of silence is in effect shall notify such individual of the prohibitions contained in this section. While the cone of silence is in effect, any city employee, official or member of the city commission who is the recipient of any oral communication by a potential vendor or vendor's representative in violation of this section shall create a written record of the event. The record shall indicate the date of such communication, the persons with whom such communication occurred, and a general summation of the communication.
- (e) *Violations/penalties and procedures.*
- (1) A sworn complaint alleging a violation of this ordinance may be filed with

the city attorney's office. In each such instance, an initial investigation shall be performed to determine the existence of a violation. If a violation is found to exist, the penalties and process shall be as provided in section 1-15 of this Code.

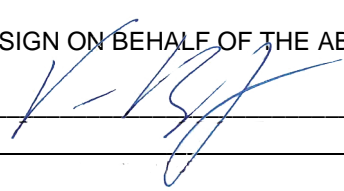
- (2) In addition to the penalties described herein and otherwise provided by law, a violation of this ordinance shall render the competitive solicitation void at the discretion of the city commission.
- (3) Any person who violates a provision of this section shall be prohibited from serving on a City of Key West advisory board, evaluation and/or selection committee.
- (4) In addition to any other penalty provided by law, violation of any provision of this ordinance by a City of Key West employee shall subject said employee to disciplinary action up to and including dismissal.
- (5) If a vendor is determined to have violated the provisions of this section on two more occasions it shall constitute evidence under City Code section 2-834 that the vendor is not properly qualified to carry out the obligations or to complete the work contemplated by any new competitive solicitation. The city's purchasing agent shall also commence any available debarment from city work proceeding that may be available upon a finding of two or more violations by a vendor of this section. (*Ord. No. 13-11, § 1, 6-18-2013*)

**VENDOR CERTIFICATION REGARDING  
SCRUTINIZED COMPANIES LISTS**

Respondent Vendor Name: <u>Metric Consulting, LLC</u>		
Vendor FEIN: <u>47-4413674</u>		
Vendor's Authorized Representative Name and Title: <u>Veronica M. Benitez, President</u>		
Address: <u>13940 SW 136th Street, Suite 100</u>		
City: <u>Miami</u>	State: <u>Florida</u>	Zip: <u>33186</u>
Phone Number: <u>(305) 235-5098</u>		
Email Address: <u>veronica.benitez@metric-consulting.com</u>		

Section 287.135(2)(a), Florida Statutes, prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services of any amount if, at the time of contracting or renewal, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to section 215.4725, Florida Statutes, or is engaged in a boycott of Israel. Section 287.135(2)(b), Florida Statutes, further prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services over one million dollars (\$1,000,000) if, at the time of contracting or renewal, the company is on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, both created pursuant to section 215.473, Florida Statutes, or the company is engaged in business operations in Cuba or Syria.

AS THE PERSON AUTHORIZED TO SIGN ON BEHALF OF RESPONDENT, I HEREBY CERTIFY THAT THE COMPANY IDENTIFIED ABOVE IN THE SECTION ENTITLED "RESPONDENT VENDOR NAME" IS NOT LISTED ON EITHER THE SCRUTINIZED COMPANIES THAT BOYCOTT ISRAEL LIST, SCRUTINIZED COMPANIES WITH ACTIVITIES IN SUDAN LIST OR THE SCRUTINIZED COMPANIES WITH ACTIVITIES IN THE IRAN PETROLEUM ENERGY SECTOR LIST I UNDERSTAND THAT PURSUANT TO SECTION 287.135, FLORIDA STATUTES, THE SUBMISSION OF A FALSE CERTIFICATION MAY SUBJECT SUCH COMPANY TO CIVIL PENALTIES, ATTORNEY'S FEES, AND/OR COSTS AND TERMINATION OF THE CONTRACT AT THE OPTION OF THE AWARDING GOVERNMENTAL ENTITY.

CERTIFIED BY: <u>Veronica Benitez, Psy.D</u>	President
<small>PRINT NAME</small>	<small>PRINT TITLE</small>
WHO IS AUTHORIZED TO SIGN ON BEHALF OF THE ABOVE REFERENCED COMPANY.	
Authorized Signature: 	

## **CITY OF KEY WEST INDEMNIFICATION FORM**

PROPOSER agrees to protect, defend, indemnify, save and hold harmless The City of Key West, all its Departments, Agencies, Boards, Commissions, officers, City's Consultant, agents, servants and employees, including volunteers, from and against any and all claims, debts, demands, expense and liability arising out of injury or death to any person or the damage, loss of destruction of any property which may occur or in any way grow out of any act or omission of the PROPOSER, its agents, servants, and employees, or any and all costs, expense and/or attorney fees incurred by the City as a result of any claim, demands, and/or causes of action except of those claims, demands, and/or causes of action arising out of the negligence of The City of Key West, all its Departments, Agencies, Boards, Commissions, officers, agents, servants and employees. The PROPOSER agrees to investigate, handle, respond to, provide defense for and defend any such claims, demand, or suit at its sole expense and agrees to bear all other costs and expenses related thereto, even if it (claims, etc.) is groundless, false or fraudulent. The City of Key West does not waive any of its sovereign immunity rights, including but not limited to, those expressed in Section 768.28, Florida Statutes. PROPOSER understands and agrees that any and all liabilities regarding the use of any subcontractor for services related to this agreement shall be borne solely by the PROPOSER. Ten dollars of the consideration paid by the City is acknowledged by PROPOSER as separate, good and sufficient consideration for this indemnification.

This indemnification shall be interpreted to comply with Section 725.06 and 725.08, Florida Statutes.

These indemnifications shall survive the term of this agreement. In the event that any action or proceeding is brought against the City of Key West by reason of such claim or demand, PROPOSER shall, upon written notice from the City of Key West, resist and defend such action or proceeding by counsel satisfactory to the City of Key West.

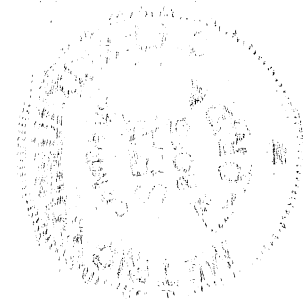
The indemnification provided above shall obligate PROPOSER to defend at its own expense to and through appellate, supplemental or bankruptcy proceeding, or to provide for such defense, at the City of Key West's option, any and all claims of liability and all suits and actions of every name and description covered above which may be brought against the City of Key West whether performed by PROPOSER, or persons employed or utilized by PROPOSER.

The PROPOSER's obligation under this provision shall not be limited in any way by the agreed upon Contract Price as shown in this agreement, or the PROPOSER's limit of or lack of sufficient insurance protection.

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COMPANY SEAL

PROPOSER: Metric Consulting, LLC  
13940 SW 136th Street, Suite 100  
Address Miami, FL 33186



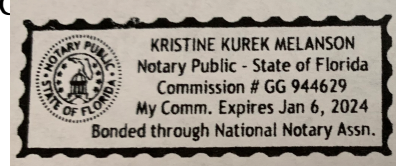
Signature *Veronica Benitez*  
Veronica Benitez, Psy.D May 8, 2023  
Print Name Date  
President  
Title

NOTARY FOR THE PROPOSER

STATE OF Florida

COUNTY OF Miami-Dade County

The foregoing instrument was acknowledged before me by means of [] physical presence or [] online notarization, this 8th day of May, 20 23, by Veronica Benitez, Psy.D, President of Metric Consulting, LLC



Signature of Notary *Kristine Melanson* Print, Type or Stamp Name of Notary  
Personally Known X OR Produced Identification N/A

Type of Identification Produced  
N/A

**Cost Proposal**

## Exhibit C: Cost Proposal

Consultant Name: Metric Consulting, LLC

Project Name: **CDBG Grant Administration Services**

Project Number: **RFP #22-007**

**Grant Administration Services (hourly):** Please enter staff position, all-inclusive hourly rate (that includes anticipated increases or any discounts offered over the years factored into the rate), hours per month, and total cost per month. Refer to Section C.12, Item 10 Cost Proposal.

Staff Position	Hourly Rate	Hours per Month	Total Cost per Month
Project Principle	\$ 168.00	5	\$ 890.00
Project Manager	\$ 158.00	15	\$ 2,370.00
Senior Grant Consultant	\$ 125.00	10	\$ 1,250.00
Data Manager	\$ 119.00	40	\$ 4,760.00
Grant Consultant	\$ 105.00	75	\$ 7,875.00
	\$		\$
	\$		\$
	\$		\$
Total Estimated Monthly Cost of Grant Administration <span style="float: right;">A)</span>			\$ 17,145.00
Total Estimated Annual Cost of Grant Administration <span style="float: right;">(A x 12) B)</span>			\$ 205,740.00
Total Estimated 5-Year Cost of Grant Administration <span style="float: right;">(B x 5) C)</span>			\$ 1,028,700.00

**Notes:**

The Cost/Price selection criteria is scored based on a formula. The “Total Estimated 5-Year Cost of Grant Administration” price from above is what’s plugged into the formula. If the proposed cost is more than twice the lowest proposed cost, it will trigger a negative number. Negative numbers are assigned a score of zero (0) rather than using a negative number.

**Formula:**

Cost/Price scores are determined by the proposal with the lowest total cost; lowest total cost gets the maximum number of cost points; remaining proposals are rated using the following formula:

$$[1 - (B-A)/A] \times C = \text{Final Cost Score}$$

A = lowest Offeror's cost

B = Offeror's cost being scored

C = maximum number of cost points available



13940 SW 136th Street  
Miami, FL 33186



## Contact

**Martin Altman, PMP**

Vice President of Emergency Management  
and Long Term Recovery

[martin.altman@metric-consulting.com](mailto:martin.altman@metric-consulting.com)

850.445.7487

[www.metric-consulting.com](http://www.metric-consulting.com)