

The background of the entire page is a tropical sunset scene. It features three palm trees in silhouette against a bright yellow sun that is partially obscured by the trees. The sky transitions from a deep orange at the horizon to a lighter yellow at the top. In the foreground, there is a large, stylized geometric shape that resembles a folded piece of paper or a large 'V' shape. This shape is composed of several overlapping layers in shades of blue, green, and yellow, creating a sense of depth and movement. The shape points upwards towards the sun and downwards towards the bottom of the page.

GrantWorks

Proposal for
Grant Writing and Grant Administration Services - RFP 22-005

CITY OF KEY WEST

September 21, 2022

September 21, 2022

Teri Johnston
City Mayor
City of Key West
1300 White Street
Key West, Florida 33040

**Subject: City of Key West, Florida Request for Proposal (RFP #22-005)
Grant Writing and Grant Administration Services**

Dear Mayor Johnston:

GrantWorks, in association with Florida certified Woman-Owned Business Enterprise (WBE) subcontractors, Erin L. Deady, PA, and OVID Solutions (Julie Dennis), appreciates the opportunity to respond to your Request for Proposals for Grant Writing and Grant Administration Services. More local governments have turned to GrantWorks for American Recovery Plan Act (ARPA) grant administration and technical advisory support than any other firm in the United States. We have the proven people, processes, and tools to secure funding and advance the City's strategic planning objectives to move Key West Forward!

Founded in 1979, GrantWorks has assisted over 450 state, county, and city government entities design and deliver a wide range of critical federal and state-funded programs and projects. Our experience spans the areas of infrastructure, housing, community and economic development, mobility, digital connectivity, transportation, environmental, coastal protection, disaster recovery, mitigation, and resilience. Over the past 40+ years, we have successfully secured and managed over \$8 billion in federal and state grant-funded projects focused on improving the communities in which we live, work, and play.

As reflected in our name, GrantWorks provides comprehensive grant management services spanning the entire lifecycle, from project identification and selection, grant writing, to grant administration and close-out. Our ARPA team has 32 full-time staff and provides comprehensive ARPA services including program and project management, procurement, compliance with state and federal regulations, tracking and reporting, communications and community engagement support, and implementation of funded projects. Led by our Florida-based Program Manager, Holly Miller, J.D. and Project Manager, Laurie Gehlsen, we help you simplify the complexity of ARPA funds management, navigate your funding and project options, optimize your investments (leverage additional grants, braiding of funds, etc.), accelerate project timelines, maintain compliance, and close projects out with transparency and confidence.

To date, we have helped over 135 cities, and 40 counties administer over \$900 million in ARPA funds. Our core focus on grant writing and administration services, coupled with our proven record of accomplishment, makes the GrantWorks Team the City's ideal partner to assist with this critical assignment. As the City reviews and scores the proposals received in response to your RFP, please remember that GrantWorks is open to negotiating scope and fee structure before the City makes a final selection. Our team is ready to help you meet your goals. We appreciate your consideration and look forward to the opportunity to guide you on your infrastructure program.

Yours sincerely,

GRANTWORKS, INC.



Bruce J. Spitzengel
President

GrantWorks

PRIME CONTRACTOR

GrantWorks, Inc.
2201 Northland Drive
Austin Texas 78756
tel: 512-420-0303 | fax: 512-420-0302
web: www.grantworks.net

PROGRAM AND PROJECT MANAGERS

Holly Miller
Program Manager
mobile: (850) 567-0018
holly.miller@grantworks.net

Laurie Gehlsen
Project Manager
mobile: (602) 716-1869
laurie.gehlsen@grantworks.net

AUTHORIZED REPRESENTATIVES

Jo Carroll
Senior VP of Operations
mobile: 797-777-5225
fax: (512) 420-0302
email: jo@grantworks.net

Ken Pevovar, PMP
Senior VP of Program Management
mobile: 732-740-7493
fax: 512-420-0302

PROJECT

CITY OF KEY WEST RFP 22-005

Grant Writing and Grant Administration Services



This proposal is presented with consideration to the community's strategic plan—*Key West Forward*.

ABOUT US

GrantWorks was founded in 1979. Over four decades in business, we have successfully secured and managed more than \$8 billion in grant-funded projects.

We offer the City of Key West **ARPA specialization, professional expertise, innovative technology, and proven performance**. Our goal is to help our clients simplify the complexity of grant fund management, navigate funding opportunities and project options, accelerate project timelines, and close out projects with transparency and confidence.

At the heart of everything we do is our mission to build stronger, smarter, and more resilient communities. We develop meaningful partnerships with our public sector clients, seek opportunities to optimize their investments (leveraging additional grants, braiding of funds, etc.), and work together to solve complex infrastructure challenges. "Building our nation's communities: help for today, hope for tomorrow," is more than a corporate tagline, it describes our sincere aspiration to create a better future for all through community development.

+\$8 BILLION

in federal and state assistance

370

employees nationwide

1979

year GrantWorks was founded

450

government entities served



ARPA SPECIALIZATION

More counties and cities have turned to GrantWorks for ARPA grant and funds management support than any firm in the United States. GrantWorks manages ARPA funds for 135 cities and 45 counties, making us the nation's leading ARPA program management and advisory services provider and the City of Key West's best-qualified partner for this critical assignment.



PROFESSIONAL EXPERTISE

GrantWorks' organizational strength is in our exceptional team of 370 grant professionals. More than 50% of our staff hold a master's degree in relevant disciplines such as law, city planning, engineering, business administration, and construction management. Over two dozen team members have joined GrantWorks after successful careers in state and local government, or grant-related consultancy. At least 40% hold professional accreditations and certifications such as:

- **PMP** - Project Management Professional
- **CFM** - Certified Floodplain Manager
- **AICP** - American Institute of Certified Planner
- **CPA** - Certified Public Accountant
- **PE** - Professional Engineer
- **CCM** - Certified Construction Manager

INNOVATIVE TECHNOLOGY



Sound data management, programmatic transparency, and continuous audit readiness are ensured through GW20/20—our proprietary grant management solution. Built to address the unique and specific require-

ments of grant-funded project management, GW20/20 provides clarity and accuracy throughout the entire program lifecycle.

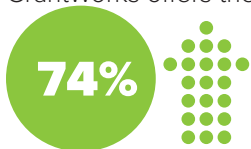
GW20/20 will be tailored to optimize the management of the City of Key West's program and project data. It is accessible through a secure, credential-based, online dashboard. With extensive capabilities and few limitations on inputs or outputs, it gives users unrivaled insight to track unlimited project data accurately and efficiently.

Based on key program components, GW20/20 can generate requirements and comprehensive checklists. Funding sources, project types, and award amounts trigger powerful tools such as reporting schedules, compliance guidelines, eligibility criteria, economic impact intelligence, and potential risks and hazards.

PROVEN PERFORMANCE

GrantWorks offers the City of Key West the experience and expertise of a firm that has successfully written, secured, and administered 1,159 infrastructure and community development grants. In the past three years, GrantWorks has written 359 infrastructure and community development grants that have yielded 265 awards for our state and local government clients—a win

rate of 74% that is climbing as some applications are still under evaluation for award in 2022.



SERVICES

- Grant Writing & Application Development
- Grant Administration & Management
- Program/Project Management
- Marketing & Outreach
- Intake (for Program Participants)
- Project Eligibility Reviews
- Home Elevation Scopes
- Beneficiary Eligibility Determinations
- Feasibility Reviews
- Cost Estimates
- Reviews for Duplication of Benefits
- Records & Data Management
- Federal & State Procurement
- On-Site Davis-Bacon Labor Standards
- Uniform Act Compliance (Acquisition)
- Environmental Review & Clearance
- Mapping/GIS
- Construction & Project Management
- Federal, State & Local Compliance
- Reporting, Audit & Monitoring Support

AREAS OF EXPERTISE

- Infrastructure
- Housing
- Transportation
- Public Buildings & Facilities
- Community & Economic Development
- Coastal Protection
- Disaster Recovery
- Mitigation
- Resiliency

SUBCONTRACTORS

ERIN L. DEADY, P.A.

Erin L. Deady, PA
54-1/2 SE 6th Avenue
Delray Beach, Florida 33483
tel: 954-593-5102
email: info@erindeadylaw.com

Erin L. Deady, P.A., is a full-service legal and consulting firm. Firm President Erin Deady is a Florida licensed attorney, a certified planner by the American Institute of Certified Planners (AICP), and a LEED AP. Erin's practice primarily focuses on public sector government representation but includes numerous private sector and agricultural clients. Her practice includes environmental restoration initiatives, water, energy, climate, local government, administrative law, and land use issues. Erin provides subject matter expertise. Learn more at erindeadylaw.com

Key West Success

Erin L. Deady, P.A. was retained by the City of Key West to write a grant submitted to the Florida Division of Emergency Management for the State's Watershed Planning Initiative. The grant was compiled, scoped and budgeted in June 2022 and timely submitted. On September 16, 2022, the City received notification of the pending grant's award. The Watershed Planning Initiative is funded through a \$26.6 million grant under the Hazard Mitigation Grant Program (HMGP), as approved by FDEM and the Federal Emergency Management Agency (FEMA), with the purpose of creating cost-effective and Watershed Master Plans (WMP) throughout the state of Florida. The City of Key West is currently a Class 5 within the CRS program and a Watershed Management Plan (Activity 452.b) is a pre-requisite for the City to improve its rating within the program. Erin L. Deady, P.A. also worked with the state to ensure that local matching funds could include state Resilient Florida planning grant awards; thus assuring the City would not have to provide a 25% cash match for the program and instead being able to leverage its Resilient Florida State funding.



Ovid Solutions
47 Andrew J Hargrett Sr Road
Crawfordville, Florida 32327
tel: 850-445-1932
email: info@ovidsolutions.net

Founded by former Florida Department of Economic Opportunity (DEO) Division of Community Development Director, Julie Dennis, OVID Solutions is a woman-owned and operated consulting firm that specializes in helping communities plan and secure dollars to implement large-scale visions. The firm helps organizations with unique missions — economic development, affordable housing, historic preservation, educational programming, pandemic relief, sea turtle rehabilitation; you name it. They also work with communities to help implement major infrastructure projects. In the past three years, OVID Solution has secured more than \$40 million for its clients and will provide grant writing services. Learn more at ovidsolutions.net

OVID Solutions ARPA Experts Help Collier County Families in Need

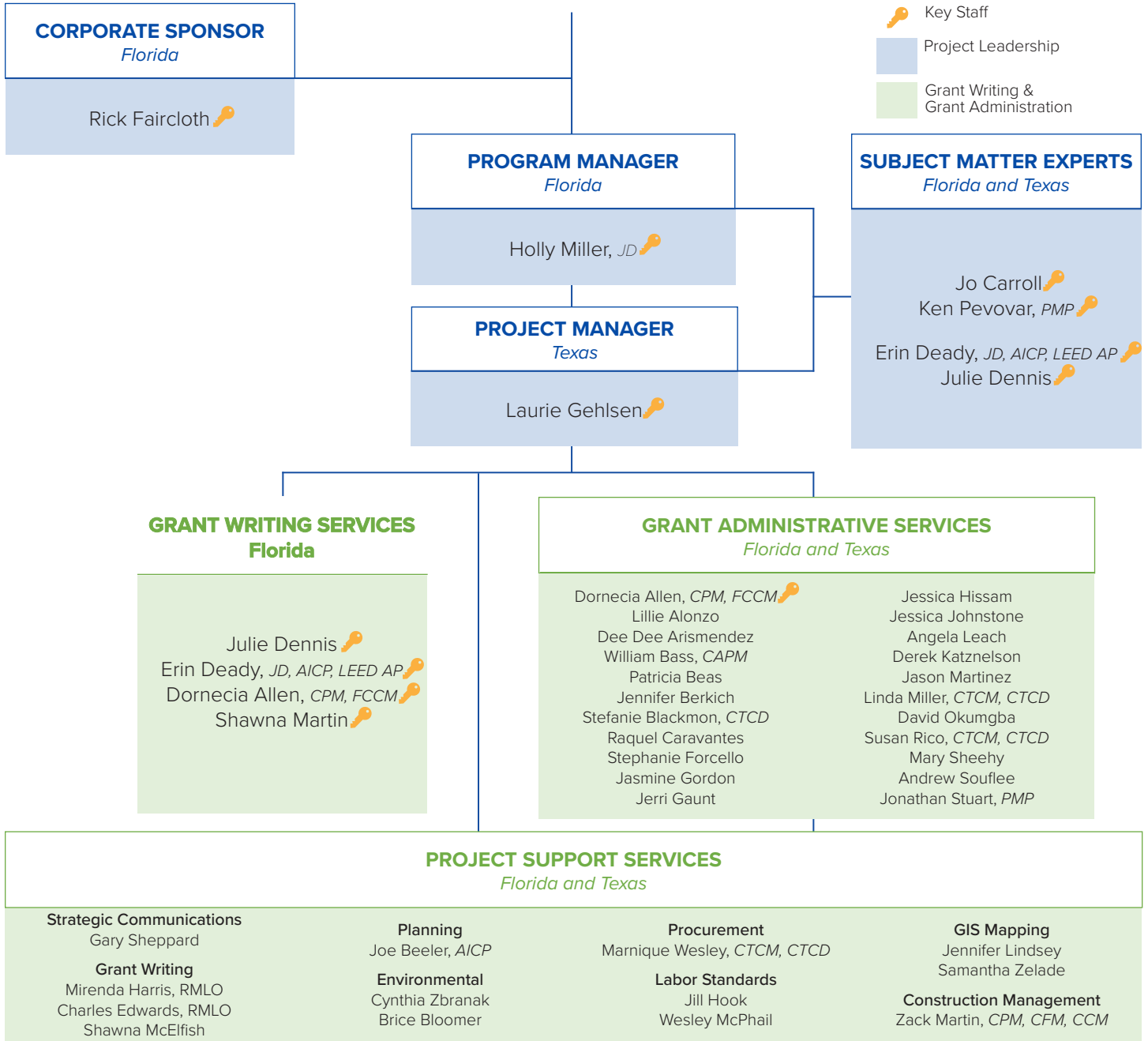
The U.S. Department of Treasury recently recognized Collier County for best practices in helping revitalize the economy and ensuring COVID-19 relief funds reach the most historically underserved communities in the County. Before receiving these federal funds, Collier County Department of Community & Human Services contracted with federal policy and grants experts OVID Solutions and technology innovator Coastal Cloud to develop a unique plan to help individuals, families, and businesses across the County.

In a recent Treasury report, *Equity and Outcomes Resource Guide: How governments are incorporating equity, community engagement, evidence, and performance management into their use of State and Local Fiscal Recovery Funds*, Collier County was the only Florida government entity specifically highlighted for ensuring funds would go toward improving the public health and economic circumstances of socially vulnerable families. With assistance from OVID Solutions and Coastal Cloud, Collier County conducted research and analysis to determine what impacted residents, businesses, and communities could best benefit from this funding.

"We appreciate the well-deserved recognition Collier County has received from the federal government on distributing these funds to vulnerable citizens," said Julie Dennis, CEO of OVID Solutions. **"We know how important it is to make every dollar count."**

PROPOSER INFORMATION

CITY OF KEY WEST, FLORIDA



PROJECT ROLES & RESPONSIBILITIES

| Corporate Sponsor | Subject Matter Experts | Program Manager | Lead Project Manager | Grant Writers | Project Managers | Project Support Services |
|--|---|---|--|---|---|---|
| Commits resources and advocates for projects. Ensures that the City is satisfied with the services that GrantWorks provides. | Identifies, guides, and advises on grant programs and the grant work being performed. | Provides high-level administrative, planning, and coordination support to the Lead Project Manager, City of Key West, and local stakeholders. | Oversees and coordinates with assigned Project Managers to initiate, plan, execute, manage, monitor, control, and close out individual projects. | Finds funding opportunities and writes applications for grant funds, including research, drafting grant requests, and submitting applications for approval. | Designs and implements assigned project(s). The projects assigned depend on the project type. | Provides specialized technical expertise and support services as needed for the City's selected projects. |

THE PATH FORWARD



As part of our RFP review and due diligence process, we have held various working sessions to develop a tailored technical approach that suits the unique needs of the City of Key West. This includes a review of *Key West Forward, The Strategic Plan of the City of Key West 2021-2024*.

We understand the six (6) priorities in the City's Plan include:



Affordable Housing



Sea Level Rise



Roads & Sidewalks



Environmental Protection



Cleanliness



Traffic & Pedestrian Friendliness

We further understand the Plan calls for greater focus on improving community-wide communications and City employee morale and engagement.

As stated in the Plan, funding is an essential ingredient to successful implementation of *Key West Forward*. GrantWorks offers the City a partner with the ideal blend of grant writing and grant administration technical acumen and experience required to **navigate the City's funding and project options, secure a wide-range of federal and state grants, optimize City investments (leverage additional grants, braiding of funds, etc.), accelerate project timelines, support community engagement and project communications, maintain compliance, and close projects out with transparency and confidence.**

The GrantWorks Team understands that the City of Key West seeks a qualified consultant with expertise in grant writing and grant administration. The City intends to select a consultant to assist the City with grant writing at the local, state, and federal level. Grant writing services needed include grant funding needs analysis, research, identification, development, review, submittal, and reporting. In addition, the City intends to select a consultant to assist with grant administration at the local, state, and federal level with priority on the City's American Recovery Plan Act (ARPA) Coronavirus State and Local Fiscal Recovery Funds. Grant administration services include assessment, planning, reimbursement, compliance, and reporting.

The breadth and depth of our grants experience, including managing over \$900 million in ARPA funds for 180 cities and counties, allow us to offer the proven people, processes, and tools necessary to help City leadership make *Key West Forward* a reality.



KEY WEST SLFRF FUNDS

The City of Key West has received a total of \$17,098,443 in SLFRF allocation. With a variety of funding types and sources, it is critical that the City utilize a firm that understands the need to manage these as discrete funds, each with its own complexities.

Breakdown

\$12,079,588 in funds for Non-Entitlement Units (NEU) (ARPA Section 603) from Florida Division of Emergency Management
\$5,018,855 Coronavirus State and Local Fiscal Recovery Funds (ARPA Section 602) from Florida Department of Transportation

Considerations

- U.S. Treasury Final Rule Standard Allowance - allows a local government to expend up to \$10 million of its CSLFRF funds in the Revenue Replacement category without having to demonstrate actual lost revenue. This provides wide latitude to the City for its potential utilization.
- As a subrecipient of these funds, the City of Key West must adhere to 2 CFR 200 uniform administrative requirements, cost principles, and audit requirements for the management and reporting of these funds.

MOVING FORWARD WITH GRANTWORKS

GrantWorks will provide all appropriate and eligible administrative support and grant management services for grant-funded projects, including acquisition, procurement, labor monitoring, financial management, construction oversight, and other special grant-specific compliance requirements. We follow all requirements of the funding agency program to create an audit-ready project and project file. Our efficient and effective methodology has been refined over our 40 years in business.



Establish Project Goals – We listen first to ensure there is an agreement among City management, project sponsors, and other stakeholders on the purpose and goals of each ARPA project. Clear, specific, and measurable goals help define the project scope.

Develop Detailed Work Plans – GrantWorks provides detailed Work Plans that describe how we will perform project work for the City of Key West during each phase of this engagement. Working with the City, we will define all the deliverables, outline the necessary tasks to produce them, and identify any associated risks. We will assign responsibilities for the tasks and deliverables with appropriate due dates and accountabilities, risk management activities, and communication requirements. Sample Work Plans are included on the following pages, however, tasks, schedules, and services will vary based on the City's specific goals and objectives.

Manage the Project Scope Effectively – GrantWorks will define the project scope with the City in the goal setting and planning stages of a project. Managing the scope is one of the more challenging parts of managing projects, so we coach subrecipients in techniques to avoid scope creep or change orders. Our Program Manager will always be alert for changes to scope and effectively manage those changes.

Cultivate Effective Communications – It is key to identify the most effective communication channels needed to keep relevant stakeholders informed of the project's progress. Management and project sponsors may want regular status reports or only the highlights and the exceptions. Clients and vendors may need statements of work, contracts, and progress reviews. GrantWorks will work with the City to define and manage the frequency and types of communication that are most appropriate for each stakeholder group, and incorporate this information into a communication plan, which is then incorporated into the project work plan. Our projects thrive because of great communication between our project managers, our clients, and any stakeholders.

Rely on City Management Support – City management support ties back to agreeing on clear project goals. City management must agree that the project is essential, adds value to the residents and the City, or solves a pressing problem. If City management does not see the value of the project, staffing, and funding resources may not be available for the project.

BRAIDING FUNDS TO MAXIMIZE INVESTMENT

GrantWorks administers a wide variety of state and federal grants. We frequently help our clients identify and leverage additional grant opportunities and combine or “braid” funds from varying sources to fund individual projects. This allows our clients to optimize their investments and maximize the impact of every grant received.

OUR PROJECT TEAM

GrantWorks' will manage and oversee the City's projects using an experienced, knowledgeable, and well-rounded team and a team of Subject Matter Experts that will readily support our Project Manager. Throughout the project lifecycle, they will be available to advise and assist the City with specialized knowledge regarding ARPA requirements and other federal grant compliance.

Our Program Manager provides high-level administrative, planning, and coordination support to the Project Manager, the City, and local stakeholders. Our Project Manager coordinates the planning and execution of projects by overseeing assigned Grant Writers and Project Managers. She will conduct daily/weekly briefings on application development and awarded project progress. She will communicate clearly with staff and elected officials, monitor milestones, and ensure appropriate support services are available throughout the project lifecycle. She will appropriately scale resources to fit the phase and projects selected, ensuring that the necessary support is available throughout the life of the engagement.

Through our Sponsor, GrantWorks commits resources and advocates for projects. GrantWorks Project Support Services will be accessed as needed based on the selected project types. Their services include environmental compliance, labor monitoring, acquisition expertise, procurement per 2 CFR 200 compliance, financial analysis, GIS mapping, and other services needed to implement the ARPA and other grant funded projects.

We can help the City of Key West create a well-run, efficient, and successful program that complies with all state, federal, and local reporting requirements. We provide ARPA and other grant-specific technical advisory services, regulatory compliance expertise, grant administration duties, document compliance, and guidance and oversight throughout the project life cycle.

Our experienced, knowledgeable, and well-rounded team and a select group of Subject Matter Experts with considerable knowledge and experience related to their key subjects will support our Project Manager. Throughout the project lifecycle, they will be available to advise and assist the City with specialized knowledge regarding specific grant requirements and other cross-cutting federal grant compliance.

GrantWorks adopts the audit and closeout philosophy that projects should 'begin with the end in mind.' This simple statement means we create policies and procedures that support a compliant operation and a continuous closeout process throughout the lifecycle, making final closeout steps routine and predictable. We will build an audit-ready program from the beginning, structured for closeout, including critical checkpoint checklists and transparent reporting.

Our Work Plan is divided into five phases as shown below:

GRANT WRITING



ADMINISTRATION





GRANT WRITING PHASE 1: Evaluation & Research

Duration: 1 to 45 Days

EVALUATION & RESEARCH

GrantWorks identifies and evaluates community needs and state/federal grant resources. We work closely with the City and stakeholders to assess projects, funding sources, and strategic and capital improvement plans to evaluate community needs. Our team also works closely with the City to vet your strategic plan, *Key West Forward*, and recommend the most suitable funding opportunities based on community needs. As GrantWorks and the City begin to identify projects, we provide valuable advisory information to support the decision-making process, including project eligibility, compliance requirements, potential risks, impact analysis, and expenditure timelines.

ASSIGNED PERSONNEL & STAKEHOLDERS:

| | |
|--|---|
| Identified stakeholders Elected Officials City Point(s) of Contact GW Grant Writers GW Program Manager | GW Project Manager GW Subject Matter Experts GW Planners GW GIS Specialist |
|--|---|

MANAGEMENT PLAN TASKS:

- 1.1 Identify and consult stakeholders (i.e., elected officials, staff, community leaders, impacted citizens)
- 1.2 Review and evaluate existing community surveys, reports, market analysis, planning documents
- 1.3 Provide independent assessment of needs, if requested, by conducting outreach events, developing/distributing surveys, meeting with focus groups, evaluation efforts taken to date, identifying potential gap needs, and providing collaborative advisory services to City leadership, staff, and community members
- 1.4 Develop recommendations regarding the identification and prioritization of Community Needs
- 1.5 Research available grant resources, analyze legislation/guidebook(s) to identify potential funding opportunities for Priority Needs, develop timelines, and prepare for rapid mobilization of application teams
- 1.6 Identify/prioritize eligible programs/projects that may be available to address needs and identify/match community needs and projects with the most appropriate funding resource
- 1.7 Conduct neighborhood surveys, if needed, to solidify eligibility criteria
- 1.8 Perform analysis of each grant's compliance requirements and scoring criteria
- 1.9 Conduct Scoring Criteria Analysis and pre-score potential applications to inform the likelihood of the project being funded and make recommendations to the City on whether to proceed
- 1.10 Develop "Go/No-Go" recommendations for each project and grant fund

DELIVERABLES:

- ✓ Grant Program Research
- ✓ Independent Needs Assessment, if requested
- ✓ Beneficiary Survey, if needed per Grant Requirements
- ✓ Prioritized Listing of Eligible City Projects and Grant Programs
- ✓ Pre-Scored Evaluation of Grant Applications
- ✓ Go/No Determination

GRANT WRITING PHASE 2: Application Services

Duration: 1 to 120 Days

APPLICATION SERVICES

GrantWorks develops comprehensive application packages, compiles the necessary documents and exhibits, works with others to obtain technical details, oversees the submittal process, and provides status reporting. We provide seasoned Grant Writers and highly specialized support staff to work with and guide the City during the grant application process. Our services include GIS mapping, public meetings, public notices, data collection and analysis, community needs assessments, procurement services, income surveys, grant application package preparation, and template agenda descriptions. We follow all funding agency application guidebook requirements so that submitted applications meet the application criteria.

ASSIGNED PERSONNEL & STAKEHOLDERS:

| | |
|--------------------------|---------------------------|
| Identified stakeholders | GW Program Manager |
| Elected Officials | GW Project Manager |
| City Point(s) of Contact | GW Subject Matter Experts |
| GW Grant Writers | GW Planners |
| | GW GIS Specialist |

MANAGEMENT PLAN TASKS: GrantWorks will identify and evaluate community needs and available state/federal grant resources.

- 2.1 Analyze application submittal requirements and timelines and develop application submittal plan(s)
- 2.2 Plan and conduct neighborhood surveys, schedule and conduct public meetings/hearings, and prepare public notices
- 2.3 Use pre-established tools for a comprehensive and efficient data collection process to drive application planning, narratives, and prioritization
- 2.4 Develop and present strategic considerations related to potential scoring advantages and challenges
- 2.5 Develop all required narratives and prepare exhibits, including maps, charts, and tables
- 2.6 Assist with professional services procurement to prepare cost estimates and/or designs (per application requirements)
- 2.7 Complete preliminary environmental analysis to identify critical environmental concerns
- 2.8 Finalize application package, guide submission process via the online grants.gov system (if available), and respond to requests for information through the final selection/award phase
- 2.9 Secure funds, identify critical issues, discuss potential compliance issues, and oversee the execution of the Grant Funding Agreement(s)
- 2.10 Identify and develop reporting narratives, metrics, and templates for City oversight and for grant compliance using GW20/20

DELIVERABLES:

- ✓ Analysis of Application Submittal and Eligibility Requirements
- ✓ Timelines for Application Submittal and Supporting Documentation
- ✓ Supporting Documentation per Grant-Specific Applications
- ✓ Procurement of Professional Services as Needed
- ✓ Preliminary Environmental Analysis as Needed
- ✓ Public Notices and Public Meetings
- ✓ Completed Application Packages
- ✓ Grant Funding Agreement(s)



ADMINISTRATION PHASE 1: Project Kickoff

Duration: 1 to 30 Days of Grant Award

PROJECT KICKOFF

GrantWorks stands up and manages ARPA funds and other awarded grants to maintain continuous project oversight and maximize speed, quality, and production. We develop tailored processes, templates, and communication protocols to lay a foundation for successful project implementation. GrantWorks' approach to consulting services addresses the City's existing needs. We kick off each project by identifying the City's internal procedures and processes, then customize the project schedule, communication plan, management tools, and deliverables to meet your goals.

ASSIGNED PERSONNEL & STAKEHOLDERS:

| | |
|------------------------------------|---|
| City Point(s) of Contact | GW Program Manager |
| City Auditor | GW Project Manager |
| City Engineering/Procurement Depts | GW Subject Matter Experts |
| | GW Project Support Team (Environmental, Labor Monitoring, etc.) |

MANAGEMENT PLAN TASKS: GrantWorks will develop comprehensive application packages, compile the necessary documents and exhibits, work with others to obtain technical details, oversee the submittal process, and provide comprehensive status reporting.

- 1.1 Designate Support Teams, initiate the project within our System of Operation, GW2020, and develop project-specific milestones/deliverables for tracking and monitoring
- 1.2 Prepare agenda and schedule/attend Project Kickoff Meeting (in person or virtual), identify initial priorities, anticipated deliverables, schedules, communication protocols, and next steps
- 1.3 Develop/modify preliminary Grant Management Plan/policies and project schedule in accordance with compliance requirements, establish monitoring plan, and integrate into reporting process
- 1.4 Develop and share Communication Plan, Initial Reporting Matrix & Reporting Plan with sample reporting templates, and Grant Implementation Plan to establish comprehensive, transparent operations road map
- 1.5 Develop Initial Document Management & Record Retention Plan to produce an audit-ready project file in accordance with grant-specific and unique requirements, including policies for record retention period, document collection, and sharing/transition of data
- 1.6 Identify procurement needs, provide policy templates for key compliance factors (i.e., financial mgmt, construction mgmt, environmental, labor, quality) and create RACI Matrix to detail key management functional responsibilities

DELIVERABLES:

- ✓ Comprehensive Kickoff Agenda
- ✓ Preliminary Project Schedules
- ✓ Grant Policy and Procedures RACI Matrix
- ✓ Communication Plan
- ✓ Grant Implementation Plan Draft
- ✓ Reporting Matrix and Reporting Plan Draft and Project Report Initial Templates
- ✓ Recordkeeping and Document Management Policy
- ✓ Administrative Project File Checklist

ADMINISTRATION PHASE 2: Project Implementation & Monitoring Duration: 90 day to End of Grant Agreement

PROJECT IMPLEMENTATION & MONITORING

GrantWorks bases its robust grant administration methodology upon industry-standard best practices focused on proven processes, meticulous controls, and frequent and timely communications. Our project management team has experts in project implementation and service-oriented activities, including working with nonprofits, small businesses, and community service providers. Our project support team includes experts in procurement and bidding, engineer/contractor coordination, financial management, and other federal grant management requirements. We use detailed document tracking systems to ensure that the City projects are on track. GrantWorks guides and assists with financial management, record-keeping, scope changes, reporting, environmental clearance, acquisition, contract closeout, and other aspects of program implementation. We prepare all forms, notices, and agenda items and provide them in advance.

ASSIGNED PERSONNEL & STAKEHOLDERS:

| | |
|-------------------------|---------------------------|
| City Elected Officials | GW Program Manager |
| City Point of Contact | GW Project Manager |
| City Auditor | GW Procurement Specialist |
| City Engineering Office | GW Subject Matter Experts |
| | GW Project Support Team |

MANAGEMENT PLAN TASKS: GrantWorks' highly experienced project managers and project support teams provide ARPA and grant-specific technical advisory services and regulatory compliance expertise, grant administration duties, document compliance, and guidance and oversight throughout the project life cycle.

- 2.1 Tailor GW20/20 to track and report on ongoing grant administration activities, and utilize our existing ARPA grant management system to manage and monitor ARPA funds
- 2.2 Review existing City procurement policies and/or provide 2 CFR 200 compliant procurement policies, and procedures, and review/provide procurement documents as requested for eligibility, allowability, allocability, and cost reasonableness
- 2.3 Identify and assist with procurement related activities, including Labor Compliance documents
- 2.4 For projects developed by the City and its subrecipients, perform on-site and desk-top monitoring for compliance, including labor, acquisition, environmental mitigation, procurement, and construction (as applicable)
- 2.5 Develop a tailored Quality Management Plan (QMP) that monitors trends, issues, and corrective actions
- 2.6 Develop Compliance and monitoring policies and procedures to provide audit-ready files using a strategy that is risk-based, collaborative, and consistent with state/federal requirements
- 2.7 Update Reporting Matrix and Reporting Plan, with initial templates and reports on progress, production, financial, and ad hoc topics, and provide regular updates with the City's designated contact person, project engineers, construction contractors, and others

DELIVERABLES:

- ✓ Grant Implementation Plan
- ✓ Quality Management Plan
- ✓ Compliance and Monitoring Plan
- ✓ Close-out policies and procedures
- ✓ Milestone and progress reports in compliance with grant-specific guidelines and frequency requirements



ADMINISTRATION PHASE 3: Project Close Out

Duration: 90 day to End of Grant Agreement

PROJECT CLOSE OUT

GrantWorks adopts the audit and closeout philosophy that projects should ‘begin with the end in mind.’ This simple statement means we create policies and procedures that support a compliant operation and a continuous closeout process throughout the lifecycle, making final closeout steps routine and predictable. We build an audit-ready program from the beginning, structured for closeout, including critical checkpoint checklists and transparent reporting.

ASSIGNED PERSONNEL & STAKEHOLDERS:

| | |
|--|--|
| City Point of Contact City Engineering Office City Auditor | GW Program Manager GW Project Manager GW Subject Matter Experts GW Project Support Team |
|--|--|

MANAGEMENT PLAN TASKS:

- 3.1 Adhere to Closeout Plan and related checklists throughout the period of performance and follow project transition requirements to transfer all duties/responsibilities and deliverables to the City
- 3.2 Provide audit and closeout support and technical assistance and general support throughout the period of performance, perform internal reconciliation of project files and records, assist in resolving federal concerns, and attend audit visits
- 3.3 Validate completion of all project milestones and deliverables by performing a thorough file audit and finalizing project checklists utilizing our GW20/20 grant management system that accelerates project closeout and provides a seamless process at closeout
- 3.4 Prepare Closeout Report, including final cross-cutting program/project reports including financial, performance milestones and metrics, acquisition, construction oversight, procurement, environmental, and labor monitoring, provide final project report, and project expenditure reports
- 3.5 Archive program/project files in accordance with grant requirements and complete grant closeout

DELIVERABLES:

- ✓ Project Monitoring Reports
- ✓ Program/Project Close-out Reports
- ✓ Funding Agency Reports
- ✓ Audit-ready Project Files

TEAM LEADERSHIP

Below are brief biographies for key members of our team. Full resumes are included in the addendum to this proposal.



Rick Faircloth, Corporate Sponsor

Our Senior Vice President of State and Local Government Services, Rick Faircloth, brings 27+ years of experience delivering technical and resource solutions for managing critical infrastructure, transportation, energy, environmental, disaster recovery, and resiliency programs for state and local governments. As Corporate Sponsor and a passionate native Floridian, Rick will ensure our Program Manager and Project Manager have the resources needed to complete all assignments and tasks under this contract to the full satisfaction of City of Key West leadership.



Holly Miller, Esquire, Program Manager

As Program Manager, Holly Miller provides high-level administrative, planning, and coordination support to the Project Manager, City of Key West, and local stakeholders. Holly has 13+ years of legal and local government experience with diverse knowledge in governmental affairs, external relations, economic development, and community engagement. She is an exceptional negotiator, mediator, presenter, and communicator- skilled at liaising diplomatically with elected officials, community influencers, and organizational stakeholders. Holly led the Florida State Government Affairs and Community Investment team focusing on advocacy and lobbying the Florida legislative and executive branches and statewide community investment and engagement for Tampa Electric and TECO Peoples Gas Systems. Holly is a licensed Florida attorney with a JD in Law from University of Florida and a BS in Political Science from Florida State University.



Laurie Gehlsen, Project Manager

Laurie Gehlsen has 20 years of state regulatory compliance and project management experience, including State Drinking Water & Water Conservation Programs. Laurie leads a group of project managers and delivers products and services according to ARPA contractual specifications and client satisfaction. Working closely with our Program Manager, Laurie will oversee and coordinate with assigned Project Managers to initiate, plan, execute, manage, monitor, control, and close out individual projects for the City of Key West. Her experience includes a State of Florida Hurricane Michael public water system recovery contract, and she represented the State of Texas during Hurricane Harvey, helping public water systems with recovery services. Laurie has an MPA in Environmental Policy, Management, and Law from the University of Colorado and a BS in Environmental Science from Metropolitan State College of Denver.



Jo Carroll, Subject Matter Expert

Jo Carroll has over 40 years of wide-ranging grant and project/program management experience. A leading expert in ARPA, she helped build GrantWorks' 32-person ARPA Team from the ground up. Her leadership experience includes designing, managing, and implementing community development, infrastructure, public works, public services, and housing programs through a multitude of funding sources including ARPA, HUD, CDBG, CDBG-DR, FEMA, HOME, HOPE, Tax Credits, and a State Housing Trust Fund. She has managed 100+ federally funded infrastructure projects and implemented and managed over \$1.6 billion in major CDBG-DR programs. She uses her extensive knowledge to help clients with policy development, program design, process implementation, and project management.



Ken Pevovar, PMP, Subject Matter Expert

Ken Pevovar has 16 years of experience in construction, project, and grant management. A national expert on ARPA funding and compliance matters, he skillfully guides and advises clients and staff on navigating the complexities tied to ARPA funds to avoid costly compliance entanglements and funding clawbacks at the end of the program. Ken also has experience managing and implementing ARPA, FEMA, HUD CDBG-DR, and public infrastructure projects in every stage of the grant lifecycle, from initiation to close-out. Ken brings real-world program implementation and construction experience to this engagement with the City of Key West.



Erin Deady, Esquire, AICP, LEED AP, Subject Matter Expert, and Grant Writer

Erin Deady's experience focuses on government representation. Her practice includes environmental restoration, water, energy, climate, administrative law, and land use issues. As a Grant Writer, she has secured \$8 million of state and federal funds for clients such as Canaveral Port Authority, Town of Lantana, Town of Century, and Municipal Energy Conservation Coalition. She has coordinated and drafted grant applications for the US Department of Commerce's Economic Development Administration, US Environmental Protection Agency, US Housing and Urban Development, Florida Department of Environmental Protection, and numerous private foundations. As a Subject Matter Expert, Erin guides and advises clients on grant programs, from grant strategy to application submission. She is a licensed Florida attorney, a certified planner, and a certified LEED AP. Erin earned a JD in law from Nova Southeastern University, an MPA in public administration from Florida Atlantic University, and a BA from the University of Miami.



Julie Dennis, Subject Matter Expert, and Grant Writer

Julie Dennis will find funding opportunities and write proposals for grant funds, including researching deadlines, drafting grant requests, and submitting proposals for approval. As examples of her grant writing capabilities, Julie advised Bay County, FL, on housing recovery in the wake of Category 5 Hurricane Michael through developing policies and procedures for over \$40 million in Hurricane Housing Recovery Program funding. She created strategies to help Calhoun County, Liberty County, and the City of Apalachicola secure millions in recovery funding to refuel local economies following Hurricane Michael. She also created a \$150 million recovery plan for the Florida Keys following Hurricane Irma and a post-disaster plan for Hallandale Beach. To date, Julie has secured nearly \$30 million in CDBG-DR funding to support communities impacted by Hurricane Michael. Before founding OVID Solutions, Julie served as the top Community Development Official for the State of Florida, managing most of the state funds available to rural communities to grow their economy, over \$100 million in federal non-entitlement grant funds, and billions of dollars appropriated following disasters. She has a diverse background in federal grant programs and knows how to help the City responsibly and transparently manage any grant funds. Julie has an MS in Planning and BS in Political Science from Florida State University.



Dornecia Allen, Grant Writer

Born in Key West, Dornecia Allen is a third-generation Florida native. She is trusted advisor for government, non-profit, and local leaders with nearly two decades of experience in contracts and grants administration. She also finds funding opportunities and writes proposals for grant funds, including researching deadlines, drafting grant requests, and submitting proposals for approval, and has managed over 60 grants annually. Dornecia develops strategies to assist communities with securing project funding to refuel local economies following disasters, advises communities on the development of policies and procedures for grant funding, and assists organizations with the management of grant awards to ensure compliance with the terms of the agreement and all local, state, and federal regulations. She earned an MPA in Public Administration from Kaplan University and a BS in Political Science from Florida A&M University. Dornecia is a Florida Certified Contract Manager, a Florida Certified Contract Negotiator, and a Certified Public Manager.



Shawna Martin, AICP, Grant Writer

Shawna Martin also finds funding opportunities and writes proposals for grant funds, including researching deadlines, drafting grant requests, and submitting proposals for approval. With five years of local government experience, Shawna connects communities to funding opportunities that help implement vital public infrastructure, planning, and strategic vision initiatives. She uses her strategic and urban planning skills to create strategies to help communities secure funding to refuel local economies, including large infrastructure projects. She also develops competitive grant applications that tell the story of the need specific to each client and advises local governments and non-profits on land use, site planning, stakeholder engagement, and other development policies. Shawna earned an MS in Planning and a BA in Biological Science from Florida State University. She is also a certified planner by the American Institute of Certified Planners.

AGENCY EXPERIENCE

- U.S. Department of the Treasury
- U.S. Department of Housing and Urban Development
- U.S. Department of Transportation
- Federal Emergency Management Agency
- Florida Department of Agriculture and Consumer Services
- State Parks and Wildlife Departments
- Florida Public Service Commission
- Florida Division of Emergency Management
- Florida Department of Transportation
- South Florida Water Management District
- Florida Department of Economic Opportunity
- Florida Department of Environmental Protection
- Florida Energy and Climate Commission

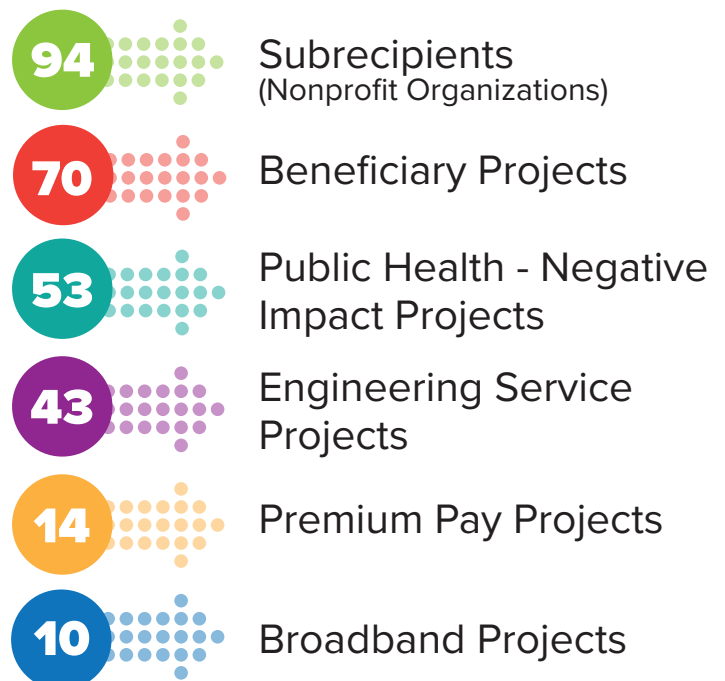
ARPA EXPERTISE

More counties and cities have turned to GrantWorks for ARPA grant and funds management support than any firm in the United States. GrantWorks manages \$900 million in ARPA funds for 135 cities and 45 counties, making us the nation's leading ARPA program management and advisory services provider and the City of Key West's best-qualified partner for this critical assignment.

Our ARPA Subject Matter Experts have been studying the Coronavirus recovery guidance since February 2021—before Congress passed the legislation. We have developed a framework of ARPA-specific project management tools and best practices. We can assist the City with transitioning prior ARPA-SLFRF activities into an actionable and compliant Program implementation, and leverage our knowledge to effectively match/combine multiple funding streams to maximize the City's investment,

We maintain direct lines of communication with advocacy groups and the U. S. Treasury Department to remain up to date on all aspects of compliance and reporting in the Treasury module. As ARPA evolves, our leadership and team stay up to date with the latest federal guidance. Always ensuring that our clients and their projects achieve federal compliance.

The City of Key West can confidently rely on our senior management team to lead this critical endeavor—they have prior program/project experience, possess federal grant management experience, and have firsthand ARPA program management experience. Our unrivaled ARPA experience and expertise translate into exceptional program delivery, audit readiness, and effective stewardship of public funds.



CASE STUDY

American Rescue Plan Act—170 Cities and Counties, Texas Louisiana and New Jersey

The U.S. Treasury allocated \$350 billion to state and local governments to help cover expenditures and mitigate the coronavirus pandemic's economic impact under the American Rescue Plan (ARPA) Act of 2021. Entitlement cities and county governments receive award allocations directly from the U.S. Treasury, while non-entitlement communities receive allocations through designated state agencies. Cities and county governments can use these funds to respond to the public health emergency or its negative economic impact by assisting residents, businesses, and nonprofits or aid to impacted local industries; provide premium pay to essential workers; supplement revenue lost due to COVID-19; or to make investments in water, sewer, and broadband infrastructure.

GrantWorks provides ARPA-related professional grant administration and project management services to multiple cities/counties in Texas, Louisiana, and New Jersey. Services include

- ARPA compliance expertise
- Grant management, guidance on project selection
- Environmental processing
- Infrastructure construction oversight
- Reporting
- Monitoring
- Project closeout

Other services include developing policies and procedures for application-based programs and assisting communities in developing and monitoring subrecipient agreements with public utilities, nonprofits, and utility corporations. Our comprehensive efforts provide the tools, experience, and personnel to decrease the burden on local governments while providing needed improvements and services. Managing a complex COVID-19 recovery fund requires a cross-functional team of seasoned, multi-disciplinary professionals led by an effective manager with the right tools and support systems.

GrantWorks uses a custom-built integrated project and financial management platform to manage project compliance, progress, expenditures, risks, and reporting for ARPA projects. We enter each identified project into the GrantWorks 20/20 (GW2020) project management database, where team

members have access to project data required to monitor quality, compliance, and progress. GW2020 creates project reports that quickly convey the budget and status of the client's overall ARPA implementation plan.

GrantWorks' extensive project management experience includes working with hundreds of state and local governments. Our team provides project management professionals 100% dedicated to ARPA-funded projects. Project managers have implemented ARPA projects in all four eligibility categories. Our experience across the state benefits the City as we share ideas and best practices from similar projects in more advanced stages of implementation. Our references will attest to our expertise, excellent customer service, quality of services, and efficient, cost-effective delivery options.

GrantWorks uses automated project checklists and workflows built into our GW2020 project management system to keep projects and communications on track. We build checkpoints to identify bottlenecks and risks. We prioritize proximity to our clients when developing project teams, facilitating in-person meetings necessary for collaboration and communication. Client cities and counties appreciate GrantWorks' availability, responsiveness, resiliency, and can-do attitude.

The GrantWorks ARPA team uses processes that have proven successful in over 40 years of working on similar

projects. We proactively communicate with all stakeholders to 1) avoid issues that may result in questioned costs or audit concerns and 2) resolve any identified problems as quickly as possible. For each municipality, GrantWorks assists with establishing and maintaining compliant financial records and processes by using the GrantWorks 20/20 database to track obligations and expenditures for each ARPA-funded project. Our database collects all information required for Quarterly Project and Expenditure Reports and ensures compliance with federal and state requirements. We focus on maintaining electronic documentation to ensure eligibility, compliance, and benchmark conformance. Other cost control services include preparing and submitting all required reports, monitoring changing ARPA compliance guidance, implementing fraud prevention and abuse practices, submitting and reviewing all program invoices, and preparing and submitting closeout documents.

GrantWorks achieves performance excellence and high-quality services through outreach and engagement of key stakeholders, project assessments, ongoing education, and research on changing ARPA requirements. We ensure completeness on the front end, and our key to success is communication and processes that keep the client included, informed, and respected throughout the entire project lifecycle. We go above and beyond to ensure that all projects are successful.

GRANTS FUNDED AND ADMINISTERED

All of the examples below represent grants that were both funded and administered by GrantWorks on behalf of our clients.

Aransas County, Texas

Requested/Funded: **\$53,860,274 / 100%**

Funding Source: Texas General Land Office

Grant Program: Hurricane Harvey CDBG-DR Infrastructure

City of Rosenberg, Texas

Requested/Funded: **\$47,585,955 / 100%**

Funding Source: Texas General Land Office

Grant Program: Hurricane Harvey CDBG-MIT Mitigation

City of Kingsville, Texas

Requested/Funded: **\$36,311,929 / 100%**

Funding Source: Texas General Land Office

Grant Program: Hurricane Harvey CDBG-MIT Mitigation

City of Mathis, Texas

Requested/Funded: **\$22,830,172 / 100%**

Funding Source: Texas General Land Office

Grant Program: Hurricane Harvey CDBG-MIT Mitigation

City of Patton Village, Texas

Requested/Funded: **\$19,000,000 / 100%**

Funding Source: Texas General Land Office

Grant Program: 2016 Floods CDBG-DR Infrastructure

Brazoria County, Texas

Requested/Funded: **\$15,291,481 / 100%**

Funding Source: Texas General Land Office

Grant Program: 2016 Floods CDBG-DR Infrastructure

Town of Refugio, Texas

Requested/Funded: **\$12,112,636 / 100%**

Funding Source: Texas General Land Office

Grant Program: Hurricane Harvey CDBG-MIT Mitigation

Refugio County, Texas

Requested/Funded: **\$11,957,845 / 100%**

Funding Source: Texas General Land Office

Grant Program: Hurricane Harvey CDBG-DR Infrastructure

GRANT FOCUS

- American Rescue Plan Act (ARPA) Administration & Management
- CARES Act - COVID-19 Response
- Infrastructure
- Transportation
- Broadband
- Economic Development, including Public Works & Economic Adjustment Assistance
- Water/Wastewater
- Stormwater & Drainage
- Housing Rehabilitation & Reconstruction
- Disaster Recovery
- Flood Mitigation
- Climate Adaptation Strategies & Resiliency
- Bicycle & Pedestrian Walking Paths
- Housing Rehabilitation & Reconstruction
- Disaster Recovery
- Flood Mitigation
- Climate Adaptation Strategies & Resiliency
- Environmental Protection
- Retrofits for Public Buildings
- Mobility & Accessibility
- Wildfire Defense & Mitigation
- Community Safe Rooms
- Parks & Recreation
- Energy Efficiency
- Safe Routes to School

CLIENT REFERENCES

| CITY OF BROWNSVILLE, TEXAS | | | |
|--|---|--|-------------------------------|
| GrantWorks provides administrative services to assist the City of Brownsville in managing and implementing its \$65.2 million allocation from the ARPA Coronavirus Local Fiscal Recovery Fund and ancillary projects financed from their ARPA allocation. | | | |
| CONTACT Helen Ramirez, AICP Interim City Manager - City of Brownsville 1001 E. Elizabeth Street Brownsville, Texas 78522 Tel: (956) 548-6007 Email: helen.ramirez@brownsvilletx.gov | FUNDING TYPE ARPA Coronavirus Local Fiscal Recovery Fund | SERVICE DATES Sept. 2021 – Dec. 2026 | AMOUNT \$65,200,000 |
| BRAZORIA COUNTY, TEXAS | | | |
| GrantWorks is the Grant Administrator for \$72.5 million in the American Rescue Plan Act (ARPA) of 2021 funds. Our scope includes financial advisory services; communication services; project management services; cost tracking, accounting, and reporting services; and auditing services. | | | |
| CONTACT Matt Sebesta, Jr. County Judge, Brazoria County 111 East Locust Street Angleton, Texas 77515 Tel.: (979) 849-1200 Email: matts@brazoria-county.com | FUNDING TYPE American Rescue Plan Act of 2021 | SERVICE DATES Aug. 2021 – Present | AMOUNT \$72,500,000 |
| WHARTON COUNTY, TEXAS | | | |
| For over 38 years, GrantWorks has provided grant writing, grant administration, grant management, and project management services to Wharton County. GrantWorks has worked on 23 projects under various grant programs with a total grant value of \$25,184,687. Below is a sample of recent Wharton County projects. | | | |
| CONTACT Phillip Spenrath County Judge, Wharton County 100 S. Fulton Street, Suite 100 Wharton, Texas 77488-5001 Tel.: 979-532-4612 Email: judge.spenrath@co.wharton.tx.us | FUNDING TYPE American Rescue Plan Act Grant <i>Professional Administration Services</i> | | AMOUNT \$8,071,766 |
| | CDBG-DR Grant Program <i>Hurricane Harvey CDBG-DR Voluntary Buyout Program</i> | | \$2,243,565 |
| | CDBG-DR Grant Program <i>Flooding and Drainage Improvements and Water and Waste-water Improvements</i> | | \$2,028,234 |
| | TxCDBG Community Development Grant <i>Water/Sewer Improvements</i> | | \$311,500 |
| CITY OF BAY CITY, TEXAS | | | |
| For over 27 years, GrantWorks has provided grant writing, grant administration, grant management, and project management services to the City of Bay City. GrantWorks has worked on 26 projects under various grant programs with a total grant value of \$12,529,622. We have provided a representative sample of recent Bay City projects below. | | | |
| CONTACT Barry Calhoun Director of Public Works, City of Bay City 1901 Fifth Street Bay City, Texas 77414 Tel.: (979) 245-7236 Email: bcalhoun@cityofbaycity.org | FUNDING TYPE American Rescue Plan Act Grant <i>Professional Administration Services</i> | | AMOUNT \$4,344,927 |
| | TxCDBG Community Development Grant <i>Water Improvements</i> | | \$350,000 |
| | TxCDBG Main Street Grant <i>Sidewalk Improvements</i> | | \$500,000 |
| | CDBG-DR Grant Program <i>Flooding and Drainage Improvements</i> | | \$287,006 |

SWORN STATEMENTS AND AFFIDAVITS

MOVING FORWARD



ANTI-KICKBACK AFFIDAVIT

State of Florida

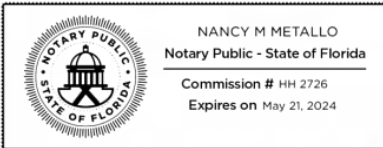
County of Orange

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: _____

[Signature]

Sworn to (or affirmed) and subscribed before me by means of ☐ physical presence or ☒ online notarization, this 8th day of September, 2022, by Bruce Spitzengel



Signer personally appeared by online notarization and produced identification

(NOTARY SEAL)

Nancy M. Metallo

(Signature of Notary Public- State of Florida)

Nancy M. Metallo

(Name of Notary Typed, Printed, or Stamped)

Personally Known _____ OR Produced Identification XX
Type of Identification Produced drivers license

NON-COLLUSION AFFIDAVIT

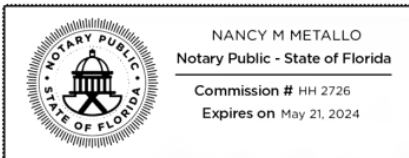
State of Florida

County of Orange


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 September, 2022, by Bruce Spitzengel



Signer personally appeared by online notarization and produced identification


(Signature of Notary Public- State of Florida)

(NOTARY SEAL)

Nancy M. Metallo
(Name of Notary Typed, Printed, or Stamped)

Personally Known _____ OR Produced Identification XX

Type of Identification Produced drivers license

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 Bruce J. Spitzengel, President
(print individual's name and title)

by GrantWorks, Inc.
(print name of entity submitting sworn statement)

whose business address is 2201 Northland Drive, Austin, Texas 78756

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

76-0446220

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

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 or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(c), 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.



(SIGNATURE)

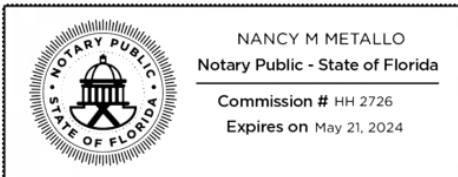
September 8, 2022

(DATE)

State of Florida

County of Orange

Sworn to (or affirmed) and subscribed before me by means of ☐ physical presence or ☒ online notarization, this 8th day of September, 2022, by Bruce Spitzengel



(Signature of Notary Public - State of Florida)

Nancy M. Metallo

(Name of Notary Typed, Printed, or Stamped)

Signer personally appeared by online notarization and produced identification

Personally Known _____ OR Produced Identification XX

Type of Identification Produced drivers license

EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT

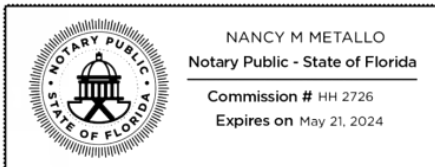
State of Florida

County of Orange

I, the undersigned hereby duly sworn, depose and say that the firm of GrantWorks, Inc.
_____ provides benefits to domestic partners of its employees on the
same basis as it provides benefits to employees' spouses, per City of Key West Code of Ordinances
Sec. 2-799.

By: _____

Sworn to (or affirmed) and subscribed before me by means of ☐ physical presence or ☒
online notarization, this 8th day of September, 2022, by Bruce Spitzengel
_____.



Nancy M Metallo
(Signature of Notary Public – State of Florida)

Nancy M. Metallo
(Signature of Notary Public – State of Florida)

Signer personally appeared by online notarization and produced identification

Personally Known _____ OR Produced Identification XX

Type of Identification Produced drivers license

CONE OF SILENCE AFFIDAVIT

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

State of Florida

County of Orange

I the undersigned hereby duly sworn depose and say that all owner(s), partners, officers, directors, employees and agents representing the firm of GrantWorks, Inc. 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).

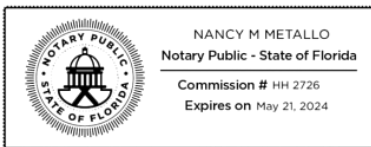


(signature)

September 8, 2022

(date)

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [X] online notarization, this 8th day of September, 2022, by Bruce Spitzengel



Signer personally appeared by online notarization and produced identification



(Signature of Notary Public – State of Florida)

Nancy M. Metallo

(Signature of Notary Public – State of Florida)

Personally Known _____ OR Produced Identification XX

Type of Identification Produced drivers license

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.

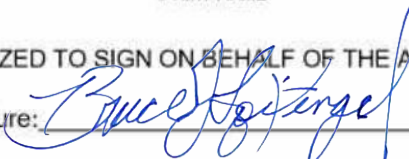
- (2) In addition to the penalties described herein and otherwise provided by law, a violation of this ordinance shall render the competitive solicitation void at the discretion of the city commission.
- (3) Any person who violates a provision of this section shall be prohibited from serving on a City 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: GrantWorks, Inc.
Vendor FEIN: 76-0446220
Vendor's Authorized Representative Name and Title: Bruce J. Spitzengel, President
Address: 2201 Northland Drive
City: Austin State: Texas Zip: 78756
Phone Number: 713-252-5872
Email Address: bruce@grantworks.net

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: Bruce J. Spitzengel, President
PRINT NAME PRINT TITLE
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.

[REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK]

COMPANY SEAL

PROPOSER:

GrantWorks, Inc.

Address

2201 Northland Drive

Austin, Texas 78756

Signature



Bruce J. Spitzengel

Print Name

September 8, 2022

Date

President

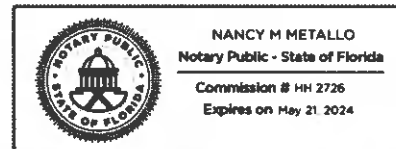
Title

NOTARY FOR THE PROPOSER

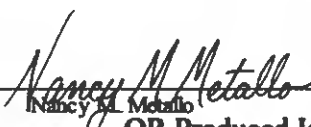
State of Florida

County of Orange

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☒ online notarization, this 8th day of September, 2022, by Bruce Spitzengel.



Signature of Notary



Print, Type or Stamp Name of Notary

Personally Known

OR Produced Identification

XX

Type of Identification Produced

drivers license

Exhibit B: Proposal Ranking Form and Scoring Worksheet

Project Name: **Grant Writing and Grant Administration Services**

Project Number: **RFP #22-005**

Firm

GrantWorks, Inc.

Date

September 8, 2022

| SELECTION CRITERIA | POINTS ALLOWED | POINTS SCORED |
|--|----------------|---------------|
| Company experience, staffing, and capabilities | 30 | |
| Approach and Methodology | 20 | |
| Qualifications and References | 30 | |
| Cost/Price | 15 | |
| Use of MBE's/WBE's | 5 | |
| Total Points | 100 | |

| EXHIBIT B | | | | |
|---|--|----------------|---|-------------------------|
| RFP 22-005 Scoring Worksheet: Grant Writing and Grant Administration Services | | | | |
| Firm Name: | | | | |
| | Range of possible scores per criterion | Score assigned | | Comments/considerations |
| Company experience, staffing, and capabilities | 0-30 | | | |
| Unresponsive | 0-4 | | Submittal lacks required information to evaluate the proposal or firm demonstrates no experience in grant writing or grant administration. | |
| Acceptable | 5-10 | | Consultant team members have less than 5 years experience writing and administering grants. Firm has some directly related experience and has completed limited grant writing and grant administration. | |
| Advantageous | 11-20 | | Consultant team members have at least 5 years experience writing and administering grants. Firm has significant experience completing multiple projects that reflect the scope in RFP Section B. | |
| Highly advantageous | 21-30 | | Consultant team members have experience that surpasses aforementioned standards. Highly experienced firm has completed extensive work on complex grant writing and grant administration projects. Firm has a significant track record of highly successful work demonstrating expert knowledge and skill. | |
| Criterion score | | 0 | | |
| Approach and Methodology | 0-20 | | | |
| Unresponsive | 0-4 | | Submittal lacks required information to evaluate the proposal or approach and methodology are not clearly stated. | |
| Acceptable | 5-10 | | Firm's approach and methodology includes a satisfactory description of a plan to perform grant writing and ARPA grant administration as well as how they will implement that plan. | |
| Advantageous | 11 - 15 | | Firm's approach and methodology includes a clear and concise description of a plan to perform grant writing and ARPA grant administration as well as implementation of that plan. | |
| Highly advantageous | 15 - 20 | | Firm's approach and methodology provides comprehensive planning and implementation of grant consulting services surpassing aforementioned standards. | |
| Criterion score | | 0 | | |
| Qualifications and References | 0-30 | | | |
| Unresponsive | 0-4 | | Submittal lacks required information to evaluate the proposal or firm demonstrates minimal qualifications and references. | |
| Acceptable | 5-10 | | Firm provided some information showing team's performance, capacity to work successfully together and depth of experience on similar assignments; submittal includes less than 5 examples of successfully funded grants and less than 5 examples of administered grants; submittal includes 3 references. | |

| EXHIBIT B | | | | |
|--|--|----------------|---|-------------------------|
| RFP 22-005 Scoring Worksheet: Grant Writing and Grant Administration Services | | | | |
| Firm Name: | | | | |
| | Range of possible scores per criterion | Score assigned | | Comments/considerations |
| Advantageous | 11-20 | | Firm's narrative demonstrates team's performance, capacity to work successfully together and depth of experience on similar assignments; submittal includes 5 examples of successfully funded grants and 5 examples of administered grants; submittal includes 3 references | |
| Highly advantageous | 21-30 | | Firm's performance, capacity to work successfully together and depth of experience surpasses aforementioned standards demonstrating exemplary grant writing and grant administration services; submittal includes 3 references | |
| Criterion score | | 0 | | |
| Cost/Price | 0-15 | | | |
| Formula score between 0 & 5 (Score determined by formula; negative score gets 0) | 0-5 | | Cost 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 | |
| Formula score between 6 & 10 (Score determined by formula) | 6-10 | | Cost 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 | |
| Formula score between 11 & 14 (Score determined by formula) | 11-14 | | Cost 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 | |
| Lowest cost proposal (Gets max points) | 15 | | Cost 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 | |
| Criterion score | | 0 | | |

| EXHIBIT B | | | | |
|---|--|----------------|--|-------------------------|
| RFP 22-005 Scoring Worksheet: Grant Writing and Grant Administration Services | | | | |
| Firm Name: | | | | |
| | Range of possible scores per criterion | Score assigned | | Comments/considerations |
| Use of MBE's/WBE's | 0-5 | | | |
| Unresponsive | 0 | | Submittal lacks required information to evaluate the proposal or use of DBE's/MBE's is not planned. | |
| Acceptable | 1-2 | | Response includes a plan to comply with the six (6) affirmative steps outlined in 2 CFR 200.321, including requiring subconsultants to take these affirmative steps. | |
| Advantageous | 3-4 | | Response includes a plan to comply with the six (6) affirmative steps outlined in 2 CFR 200.321, including requiring subconsultants to take these affirmative steps and respondent lists 1 potential MBE/WBE to contract with. | |
| Highly advantageous | 5 | | Response includes a plan to comply with the six (6) affirmative steps outlined in 2 CFR 200.321, including requiring subconsultants to take these affirmative steps and respondent lists 2 or more potential MBEs/WBEs to contract with. | |
| Criterion score | | 0 | | |
| Total firm score | | 0 | | |



City of Key West
1300 White Street, Key West, FL, 33040 (305) 809-3700

ADDENDUM NO. 1

Grant Writing and Grant Administration Services RFP # 22-005

This addendum is issued as supplemental information to the bid package for clarification of certain matters of both a general and technical nature.

QUESTIONS/CLARIFICATIONS:

Question 1

Would the City be open to explore other pricing models other than a lump sum for the grant writing services?

Response 1

Yes

Question 2

Is the City interested in exploring additional grant funding sources that might be available to them, such as the following?

- US Department of Transportation - Rebuilding American Infrastructure Sustainably & Equitably (RAISE)
- US Department of Transportation - Bridge Investment Program
- US Department of Transportation - Port Infrastructure Development Program
- Federal Emergency Management Agency - Building Resilient Infrastructure for Communities (BRIC)

Response 2

Yes

Question 3

Are the cover/cover letter/contents/dividers included in the 20-page count?

Response 3

The cover letter is included in the 20-page count. The cover, contents (if referring to a table of contents) and dividers are not included.

Question 4

As currently worded, we believe that the indemnity provision on the Indemnification Form on page 21 of the RFP is not in compliance with Florida Statute 725.08 and is unenforceable.

Please consider rewording same to conform with the statute. Suggested language per Florida Statutes 725.08 is:

“The design professional shall indemnify and hold harmless the agency, and its officers and employees, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the design professional and other persons employed or utilized by the design professional in the performance of the contract.”

Response 4

This RFP is not for design.

Question 5

Please consider REMOVING the highlighted text from the paragraph below:

3.6. CONSULTANT shall perform the professional services under this Agreement at the level customary for competent and prudent professionals in CONSULTANT’S field performing such services at the time and place where the services are provided. In the event CONSULTANT does not comply with this standard, and omissions or errors are made by CONSULTANT, CONSULTANT will correct such work that contains errors or omissions at no cost to CITY ~~and reimburse CITY through compensation for damages.~~

Response 5

Contract negotiations occur after the proposer is chosen by the City Commission.

Question 6

Please consider REMOVING the highlighted text from the paragraph below:

7.8.1. To the fullest extent permitted by law, the CONSULTANT expressly agrees to indemnify and hold harmless the City of Key West, their officers, directors, agents, and employees (herein called the “indemnities”) from liabilities, damages, losses and costs, including, but not limited to, reasonable attorney’s fees and court costs, such legal expenses to include costs incurred in establishing the indemnification and other rights agreed to in this Paragraph, to persons or property, to the extent caused by the negligence, recklessness, or intentional wrongful misconduct of the CONSULTANT, its Subcontractors or persons employed or utilized by them in the performance of the Contract. Claims by indemnities for indemnification shall be limited to the amount of ~~CONSULTANT’s insurance or \$1 million per occurrence, whichever is greater.~~ The parties acknowledge that the amount of the indemnity required hereunder bears a reasonable commercial relationship to the Contract and it is part of the project specifications or the bid documents, if any.

Response 6

Contract negotiations occur after the proposer is chosen by the City Commission.

Question 7

Please consider ADDING the highlighted text provided below:

7.9.2. CONSULTANT shall furnish an original Certificate of Insurance indicating, and such policy providing coverage to, City of Key West named as an additional insured on all policies ~~—except Professional Liability and workers’ compensation—~~ on a PRIMARY and NON CONTRIBUTORY basis utilizing an ISO standard endorsement at least as broad as CG 2010 (11/85) or its equivalent, (combination of CG 20 10 07 04 and CG 20 37 07 04, providing coverage for completed operations, is acceptable) including a waiver of subrogation clause in favor of City of Key West on all policies. CONSULTANT will maintain the Professional Liability insurance coverage summarized above with

coverage continuing in full force including the additional insured endorsement until at least 3 years beyond completion and delivery of the work contracted herein.

Response 7

Contract negotiations occur after the proposer is chosen by the City Commission.

Question 8

The City requires that we certify we provide benefits to domestic partners of our employees on the same basis as we provide benefits to employees' spouses. Our health insurance does not allow us to extend coverage to domestic partners, however, we do cover a cash equivalent. In this case, is it necessary for us to take an exception to this requirement?

Response 8

Section 2-799(e)(6) of our code of ordinances states that

Provided that the contractor does not discriminate in the provision of benefits, a contractor may also comply with this section by providing an employee with the cash equivalent of such benefits, if the city manager or his/her designee determines that either:

The contractor has made a reasonable yet unsuccessful effort to provide equal benefits. The contractor shall provide the city manager or his/her designee with sufficient proof of such inability to provide such benefit or benefits which shall include the measures taken to provide such benefit or benefits and the cash equivalent proposed, along with its certificate of compliance, as is required under this section.

2-799(a)(3) defines 'Cash equivalent' as the amount of money paid to an employee with a domestic partner in lieu of providing benefits to the employee's domestic partner. The cash equivalent is equal to the employer's direct expense of providing benefits to an employee for his or her spouse.

The cash equivalent of the following benefits applies:

[...]

b. For health benefits, the cost to the contractor of the contractor's share of the single monthly premiums that are being paid for the domestic partner employee, to be paid on a regular basis while the domestic partner employee maintains such insurance in force for himself or herself.

[...]

Question 9

You note that the total proposal length (not including required forms, Sworn Statements, or Affidavits) will not exceed 10 double (20 single) side pages. Are resumes excluded from this 20 page limit? Well over half the proposal will include resumes - even if we limit resumes to one page.

Response 9

Yes, resumes are excluded.

Question 10

Does a proposal cover count as a page toward the page limit?

Response 10

No

Question 11

Information provided in the RFP states that the City writes about 25 grant applications each year. On the pricing form, we are asked for a lump sum annual price for grant writing services, but it is unclear whether the City expects the awarded vendor to assume responsibility for all 25 grant applications or some portion of the total. To receive similar responses across bidders, could the City clarify the level of effort expected under grant writing services?

Response 11

The assumption is for the awarded vendor to assume responsibility for all 25 grant applications with assistance from City Staff for content. 25 is an average number.

Question 12

The RFP requests a monthly report detailing the time spent on grant writing effort, “summarizing the amount of time expended and describing activities undertaken during the previous month.” The request for pricing shows this as an annual lump sum paid in monthly increments. The reporting request for time expended seems at odds with your request to provide pricing as a lump sum. Can the City provide further clarification that may align the reporting request with the pricing request?

Response 12

Time estimates are acceptable for these monthly reports. This info is used as reference to estimate the complexity of each grant written.

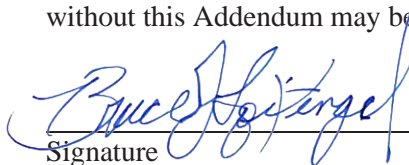
Question 13

RFP Section C.12 clearly states that 9 of the 10 listed requirements count toward the 20 single-sided page limit. Resumes are requested in this section. Would the City prefer that abbreviated resumes/bios be included to meet the page limitation, with full resumes attached as an addendum not counted against the 20-page limit?

Response 13

Resumes are not counted against the 20-page limit.

All Bidders shall acknowledge receipt and acceptance of this **Addendum No. 1** by submitting the addendum with their proposal as a required form. Proposals submitted without acknowledgement or without this Addendum may be considered non-responsive.


Signature

GrantWorks, Inc.
Name of Business

COST PROPOSAL

MOVING FORWARD



Consultant Name: GrantWorks, Inc.
Project Name: Grant Writing and Grant Administration Services
Project Number: RFP #22-005

Grant Writing Services (Lump Sum): Please enter a lump sum amount for each year to be paid monthly in twelve (12) even payments. The annual amounts should be all-inclusive and include any anticipated increases over the years. Refer to Section C.12, Item 10 Cost Proposal.

| YEAR | LUMP Amount |
|--|---------------------|
| Year 1 | \$139,000.00 |
| Year 2 | \$143,000.00 |
| Year 3 | \$147,000.00 |
| Year 4 <i>(Year 1 of two-year option to renew)</i> | \$152,000.00 |
| Year 5 <i>(Year 2 of two-year option to renew)</i> | \$157,000.00 |
| Total Grant Writing Services Amount | \$738,000.00 |

Grant Administration Services (Hourly): Please enter staff position, all-inclusive hourly rate with anticipated increases over the years, 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 |
|---|-------------|-----------------|----------------------|
| Subject Matter Expert <i>(SME)</i> | \$185.00 | 11 | \$2,035 |
| Program Manager | | | \$7,310 |
| Project Manager | | | \$7,250 |
| Construction Management | | | \$2,025 |
| GIS | | | \$750 |
| Marketing / Outreach | | | \$1,100 |
| Compliance <i>(Procurement, Environmental, Labor Standards, Etc.)</i> | | | \$1,870 |
| Total Estimated Monthly Cost of Grant Administration | | | \$22,340 |
| Total Estimated Annual Cost of Grant Administration | | | \$268,080 |
| Total Estimated 5-Year Cost of Grant Administration | | | \$1,340,400* |
| 5-Year Total Grant Writing PLUS Grant Administration <i>(This total is used for scoring)</i> | | | \$2,078,400** |

*The ARPA funds must be expended by 12/31/2026 so the 5th year option is not feasible using your ARPA CLFRF allocation. If this contract were designed as a 3-year contract with a single 1-year option that would fit the ARPA program design. Both portions can be funded using the ARPA allocation with the grant writing being listed as a Treasury Expenditure Category 6.1 "Provision of Govt Services" Your Grant Administration Services are eligible as Expenditure Category 7.1 "Administrative Services" In lieu of managing an hourly contract, we would prefer to offer Grant Administrative Services under this for a lump sum amount of \$650,000 using a milestone base contract thru 12/31/2026.

**Adjusting for a 4-year contract this total would be \$1,231,000 (\$650,000 for grant admin + \$581,000 for grant writing)

RESUMES

MOVING FORWARD





RICK FAIRCLOTH

CORPORATE SPONSOR

PROFESSIONAL QUALIFICATIONS

Rick Faircloth has over 25 years of experience delivering technical and resource solutions for managing critical infrastructure, energy, environmental, disaster recovery, and resiliency programs for state and local governments. He has experience supporting traditional and federally funded (e.g., FEMA, HUD CDBG-DR, ARPA, etc.) disaster recovery-related capital programs involving single- and multi-family housing, infrastructure, transportation assets, water/wastewater facilities, flood protection, schools, hospitals, and ports. He has a demonstrated record of collaboration and executive oversight of a wide range of complex projects throughout Florida and in major cities across the U.S., such as New York City, Boston, Houston, New Orleans, Los Angeles, and San Francisco.

As Corporate Sponsor and passionate native Floridian, Rick will ensure our Program Manager and Project Manager have all the resources needed to complete all assignments and tasks under this contract to the satisfaction of City of Key West leadership.

RELEVANT EXPERIENCE

SENIOR VICE PRESIDENT OF STATE AND LOCAL GOVERNMENT SERVICES, GRANTWORKS, INC., JACKSONVILLE, FLORIDA, FEBRUARY 2022 – PRESENT

Rick focuses on improving communities in Florida and across the U.S. by developing meaningful partnerships with public and private sector clients to help solve complex environmental and infrastructure challenges, improve public service, and build stronger, smarter, and more resilient communities.

VICE PRESIDENT, PROGRAM AND CONSTRUCTION MANAGEMENT (PMCM) AND DISASTER RECOVERY AND RESILIENCY (R&R), APTIM ENVIRONMENTAL & INFRASTRUCTURE, LLC, JACKSONVILLE, FLORIDA, OCTOBER 2013 – DECEMBER 2021

Rick led the PMCM and R&R Service Lines for a large North American engineering and construction firm with 6,000+ employees and annual revenues of over \$1.4 billion. He managed the service line's 100+ employees, project portfolio, and overall organizational performance. He established the company's flagship operations in the U.S. Virgin Islands (USVI), oversaw operations, client and community engagement, and sustained USVI and Puerto Rico growth.



25+ YEARS

PROJECT MANAGEMENT EXPERIENCE

COMPANY

GrantWorks, Inc.

EDUCATION

Bachelor of Arts, Environmental Studies, Eckerd College, St. Petersburg, Florida

HIGHLIGHTS

Experience in high-profile infrastructure, transportation, disaster recovery, and resiliency projects and programs across the United States and Territories in the Caribbean and Pacific with construction values over \$3.2 billion

REGISTRATIONS/ CERTIFICATIONS

U.S. Green Building Council, Leadership in Energy and Environmental Design – Accredited Professional (LEED AP)

TRAINING

Rice University Jones Graduate School of Business – Strategic Sales Leadership Program

BUSINESS DEVELOPMENT MANAGER – WEST REGION, CB&I ENVIRONMENTAL & INFRASTRUCTURE, LLC, LOS ANGELES, CALIFORNIA, MARCH 2012 – OCTOBER 2013

Rick was the West Region Business Development Manager for CB&I, a global engineering, and construction firm with over 50,000 employees and annual revenues of \$6.7 billion. He was responsible for developing, managing, and executing business development strategy and proposal activities for the Commercial, State, and Local Division's West Region, which generated approximately \$71 million in annual revenue. Rick oversaw regional sales, market expansion, new services, and client satisfaction. He strengthened client development, marketing, teaming relationships, project delivery, quality, staff recruitment, development, and retention. He also led capture teams in pursuit planning, development of win themes, and preparation of compelling proposals, presentations, and marketing materials.

BUSINESS DEVELOPMENT MANAGER – CALIFORNIA DISTRICT, SHAW ENVIRONMENTAL & INFRASTRUCTURE, INC., LOS ANGELES, CALIFORNIA, AUGUST 2008 – MARCH 2012

Rick was the Business Development Manager for Shaw Environmental & Infrastructure, Inc., a division of The Shaw Group, a 27,000-employee firm with annual revenues of \$6 billion. He managed business development for Commercial, State, and Local Division's California and Southwest District. He also served as the Key Account Manager for Federal Deposit Insurance Corporation (FDIC) portfolio encompassing over 1,000 projects in 40 states. Rick provided leadership, operations, technical, and client engagement support to District staff.

EMPLOYMENT HISTORY

- ▶ Senior Vice President of State & Local Government Programs, GrantWorks, Inc., Jacksonville, Florida, February 2022 – Present
- ▶ Vice President, Program Management and Construction Management (PMCM) and Disaster Recovery and Resiliency, Aptim Environmental & Infrastructure, LLC, Jacksonville, Florida, October 2013 – December 2021
- ▶ Director of Business Development – National PMCM, CB&I Environmental & Infrastructure, LLC, Jacksonville, Florida, October 2013 – July 2017
- ▶ Business Development Manager – West Region, CB&I Environmental & Infrastructure, LLC, Los Angeles, California, March 2012 – October 2013
- ▶ Business Development Management – California District, Shaw Environmental & Infrastructure, Inc., Los Angeles, California, August 2008 – March 2012
- ▶ Director of Operations – Atlanta, GLE Associates, Inc., Tampa, Florida, August 2002 – July 2008
- ▶ Senior Environmental Consultant, SES Environmental, Inc., Atlanta, Georgia, August 1999 – 2002
- ▶ Senior Environmental Specialist /Team Leader, United Consulting Group, Atlanta, Georgia, February 1995 – August 1999



HOLLY MILLER, ESQUIRE

PROGRAM MANAGER

PROFESSIONAL QUALIFICATIONS

As the Program Manager, Holly Miller will provide high-level administrative, planning, and coordination support to our Project Manager, the City of Key West, and local stakeholders. Holly is a highly experienced attorney and program manager with diverse knowledge in governmental affairs, external relations, economic development, and community engagement to support organizations' missions. Holly is an exceptional negotiator, mediator, presenter, and communicator, liaising diplomatically with elected officials, community influencers, and organizational stakeholders.

RELEVANT EXPERIENCE

VICE PRESIDENT OF FLORIDA STATE AND LOCAL GOVERNMENT SERVICES, GRANTWORKS, INC, TALLAHASSEE, FLORIDA, JULY 2022 – PRESENT

Holly is leading the company's expansion and growth initiative in the State of Florida in all aspects of Florida state and local government relations and services. She designs and manages a wide range of critical programs focused on executing strategic and tactical business plans, growth initiatives, and management consulting in infrastructure, broadband, transportation, housing, coastal protection, mitigation and resilience, disaster recovery, and economic development. She leads targeted corporate earnings growth and goals through strong government, economic, and community development initiatives and partnerships.

DIRECTOR OF STATE AFFAIRS & COMMUNITY INVESTMENT, TECO AN EMERA COMPANY, TAMPA, FLORIDA, SEPTEMBER 2020 – JUNE 2022

Holly led the State Government Affairs and Community Investment team focusing on advocacy and lobbying the Florida legislative and executive branches and statewide community investment and engagement for Tampa Electric and TECO Peoples Gas Systems. She strategically supported all business units through statewide legislative advocacy and philanthropic contributions. Additionally, she led targeted corporate earnings growth and goals through strong government, economic, and community development initiatives.

DIRECTOR OF STATE PARTNERSHIPS & STRATEGY, TECO AN EMERA COMPANY, TAMPA, FLORIDA, MAY 2019 – SEPTEMBER 2020

Holly led the State and Community Partnerships & Strategy team, strategizing, developing, and implementing legislative and corporate partnership strategies for Tampa Electric and Peoples Gas System



13 YEARS

LEGAL AND LOCAL GOVERNMENT EXPERIENCE

COMPANY

GrantWorks, Inc.

EDUCATION

Juris Doctor, International Law, University of Florida, Gainesville, Florida 2007

Bachelor of Science, Political Science, Florida State University, Tallahassee, Florida, 2004

HIGHLIGHTS

Governmental and external relations

Legislative Strategy, Advocacy, and Lobbying

Policy Research and Analysis

REGISTRATIONS/ CERTIFICATIONS

Florida Bar, License No: 56368, 2008 - Present

District of Columbia Bar, License No: 1000395, 2011 - Present

PROFESSIONAL AFFILIATIONS

Member, Boys & Girls Clubs of the Suncoast, 2022

Board Member; Florida State Fair Authority, 2022

Board Member, Henry B. Plant Museum, 2022

service areas. She also led statewide partnership engagement and outreach strategy for community partners and managed overall relations with government consultants/contract lobbyists and community leaders. Holly worked on developing the company's social responsibility strategy focused on community and corporate citizenship contribution, participation, and communication engagement, consistent with industry best practices and standards.

REGIONAL MANAGER OF LOCAL GOVERNMENT, COMMUNITY RELATIONS, AND ECONOMIC DEVELOPMENT, OCTOBER 2017 – MAY 2019

The Community liaison leads active outreach and engagement in the political process and manages relationships with local elected officials, government staff, community leaders, and customers in Pinellas and Hillsborough counties. Holly supported TECO People's Gas Services and Tampa Electric operations, promoting corporate earnings, growth, and economic development initiatives. Additionally, she led the company's corporate citizenship and investment efforts by restructuring and developing a new grant structure and contribution strategy.

REGIONAL VICE PRESIDENT OF GOVERNMENT HEALTHCARE SOLUTIONS, CONDUENT STATE HEALTHCARE, TALLAHASSEE, FLORIDA, MAY 2015 – JUNE 2017

Holly led all areas of government relations regarding healthcare contract procurement. She oversaw legal contracting across the southeastern territory of Alabama, Florida, Mississippi, and Puerto Rico. Holly identified, targeted, and won opportunities resulting in new accounts and clients. She managed large and complex procurements, created forecasts, and reported on procurement opportunities and results.

GOVERNMENTAL AFFAIRS COUNSEL, FLORIDA MEDICAL ASSOCIATIONS, TALLAHASSEE, FLORIDA, MAY 2013 – MAY 2015

Holly served as a liaison, lobbyist, and legal counsel on all efforts before Florida legislators, agency heads, and legislative staff. Led strategy and drafted priority legislation and amendments. She represented the association and coordinated with agencies, including the Florida Board of Medicine and Agency for Health Care Administration, advocating for association interests. She also identified, researched, and monitored legislative policy priorities for the organization. She communicated with legislative committees overseeing agency rulemaking, including the Joint Administrative Procedures Committee. Holly assisted in PAC coordination, supervised a team of contract lobbyists, attorneys, and consultants, and co-created legal referral services.

EMPLOYMENT HISTORY

- ▶ Vice President of Florida State & Local Government Services, GrantWorks, Inc, Tallahassee, Florida, July 2022 – Present
- ▶ Director of State Affairs & Community Investment, TECO an Emera Company, Tampa, Florida, September 2020 – June 2022
- ▶ Director of State Partnerships & Strategy, TECO an Emera Company, Tampa, Florida, May 2019 – September 2020
- ▶ Regional Manager of Local Government, Community Relations and Economic Development, Tallahassee, Florida, October 2017 – May 2019
- ▶ Regional Vice President of Government Healthcare Solutions, Conduent State Healthcare, Tallahassee, Florida, May 2015 – June 2017
- ▶ Governmental Affairs Counsel, Florida Medical Associations, Tallahassee, Florida, May 2013 – May 2015
- ▶ Assistant General Counsel & Director of Regulatory Affairs, Florida Medical Associations, Tallahassee, Florida, March 2010 – May 2013
- ▶ Corporate Counsel, Infinite Energy Inc., Gainesville, Florida, August 2009 – March 2010



LAURIE GEHLSSEN

LEAD PROJECT MANAGER

PROFESSIONAL QUALIFICATIONS

Laurie Gehlsen has 20 years of state regulatory compliance and project management experience, including 20+ years of several State Drinking Water & Water Conservation Programs. Laurie leads a group of professional project managers and delivers products and services according to ARPA contractual specifications and client satisfaction. Working closely with our Program Manager, Laurie will oversee and coordinate with assigned Project Managers to initiate, plan, execute, manage, monitor, control, and close out individual projects for the City of Key West.

Laurie also serves as a point of contact for all program quality management issues and water projects at GrantWorks. Her experience includes a State of Florida Hurricane Michael public water system contract, and she represented the State of Texas during Hurricane Harvey, helping public water systems with recovery services.

RELEVANT EXPERIENCE

LEAD PROJECT MANAGER, GRANTWORKS, INC., AUSTIN, TEXAS, MAY 2021 – PRESENT

As Lead Project Manager, Laurie leads a group of professional project managers and delivers products and services according to ARPA contractual specifications and client satisfaction. Projects range from drainage, wastewater improvement, drinking water improvements, health services, building construction, equipment purchases, and road repair to aid distribution to impacted industries. Laurie and her team have completed annual and quarterly project and expenditure reports for ARPA and implemented bulk upload features to streamline reporting.

SECTION MANAGER, TEXAS DEPARTMENT OF STATE HEALTH SERVICES, RADIOLOGY AND RECORDS UNIT AND ENVIRONMENTAL SANITATION UNIT, AUSTIN, TEXAS, AUGUST 2020 – MAY 2021

As a Section Manager, Laurie oversaw 14 people in the records unit, open records act, asbestos, lead, youth camps, hazardous chemicals, and volatile organic chemical license and exam units. She employed management techniques in coordinating personnel and resources through results-driven leadership. These techniques included task delegation, performance specifications, employee motivation, team-based problem solving and principles of performance and visual management; analytical data collection, analysis and interpretation, and statistical procedures and testing



20 YEARS

PROJECT MANAGEMENT EXPERIENCE

COMPANY

GrantWorks, Inc.

EDUCATION

Master of Public Administration, Environmental Policy, Management, and Law, University of Colorado, Denver, Colorado, 2002

Bachelor of Science, Environmental Science, Metropolitan State College of Denver, Denver, Colorado, 2000

HIGHLIGHTS

20+ years of drinking water experience

TRAINING

FEMA Emergency Management Training: 100, 200, 240, 403, 700, and 800

methods; contract, grants administration, and procurement procedures; project management and community involvement principles; data management principles and techniques to assure data integrity; public relations and meeting facilitation.

PROGRAM MANAGER FOR MUNICIPAL WATER CONSERVATION, TEXAS WATER DEVELOPMENT BOARD, AUSTIN, TEXAS, JUNE 2019 – AUGUST 2020

Laurie integrated municipal water loss management with public health. She was responsible for program education, guidance, outreach, and workshop development. She oversaw research and the preparation and coordination of annual reports and work programs. Laurie put together over 20 workshops during 2019 covering municipal water conservation and made public presentations covering complex information.

ENVIRONMENTAL CONSULTANT, FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION, AUDITOR OF FEDERAL AND STATE DRINKING WATER COMPLIANCE PROGRAM. FLORIDA, JUNE 2018 – APRIL 2019

Laurie consulted on individual regulations and rewrote policies and rules. She also served as a member of the Hurricane Michael Emergency Management Response Team.

NATURAL RESOURCES SPECIALIST, TEXAS COMMISSION ON ENVIRONMENTAL QUALITY, FEDERAL/ STATE DRINKING WATER COMPLIANCE PROGRAM, AUSTIN, TEXAS, NOVEMBER 2012 – JUNE 2018

Laurie used her extensive knowledge of the Safe Drinking Water Act and Arizona Administrative Code in this position. Her knowledge of environmental risk, public health, hydrology, geology, environmental law/policy, and project management was also helpful. She educated, encouraged, coached, and inspired others to provide water systems for safe drinking water to all citizens. She worked across teams, unit managers, section managers, and directors to ensure unit operations were efficient and effective. Unit operations include 1) the state's Monitoring Assistance Program, which provided water sampling and analysis assistance to small public water systems, 2) Compliance Assistance Coordinators, who acted as customer service representatives to public water system owners and operators, answering questions, providing guidance on drinking water regulations, assisting water systems with problem-solving compliance issues, and leading outreach events, and 3) Water quality data entry and management, including the online SDWIS program.

EMPLOYMENT HISTORY

- ▶ Lead Project Manager, GrantWorks, Inc., Austin, Texas, May 2021 – Present
- ▶ Manager, Texas Department of State Health Services, Radiology and Records Unit and Environmental Sanitation Unit, Austin, Texas, August 2020 – May 2021
- ▶ Adjunct Geology Professor, Maricopa County Community College, Phoenix, Arizona. January 2006 – Present
- ▶ Environmental Consultant, Florida Department of Environmental Protection, Auditor of Federal and State Drinking Water Compliance Program, Florida, June 2018 – April 2019
- ▶ Natural Resources Specialist, Texas Commission on Environmental Quality, Federal and State Drinking Water Compliance Program, Austin, Texas, November 2012 – June 2018
- ▶ Environmentally Safe Drinking Water Information System (SDWIS) Program Manager, Arizona Department of Environmental Quality, Phoenix, Arizona, March 2005 – August 2010
- ▶ Environmental Health Manager, South Carolina Department of Health and Environment, Columbia, South Carolina, November 2003 – July 2004
- ▶ Physical Science/Engineering Assistant, Colorado Department of Public Health and Environment, Denver, Colorado, June 2000 – November 2003
- ▶ Group/Convention Manager, Ultimate Travel, Denver, Colorado, April 1992 – May 2000



JO CARROLL

SUBJECT MATTER EXPERT

PROFESSIONAL QUALIFICATIONS

Jo Carroll has over 40 years of grant management, project program, and program management experience. She had studied and followed the ARPA legislation since February 2021, when the Senate passed it. Jo built the GrantWorks ARPA Team from the ground up. She guides and advises clients and the GrantWorks Team on the ARPA grant program and the grant work the team performs. In addition to her experience with the ARPA program, Jo has leadership experience in designing, managing, and implementing state/federally funded community development, infrastructure, public works, public services, and housing programs, including ARPA, HUD, CDBG, CDBG-DR, FEMA, HOME, HOPE, Tax Credits, and Texas Housing Trust Fund. Jo has managed over 100 federally funded infrastructure projects and implemented and managed over \$1.6 billion in major CDBG-DR programs assisting over 10,000 homeowners. She uses her extensive knowledge to help her clients with policy development, program design, process implementation, and project management.

RELEVANT EXPERIENCE

SENIOR VICE PRESIDENT OF OPERATIONS, GRANTWORKS, INC., AUSTIN, TEXAS, JULY 2020 – PRESENT

As Senior Vice President of Operations at GrantWorks, Jo provides critical leadership and managerial expertise in delivering multiple operations and programs. Her expertise is in managing HUD CDBG/CDBG-DR, ARPA, COVID-19, CARES Act, FEMA, and other state and federal programs.

Executive Sponsor/Subject Matter Expert, American Rescue Plan Act (ARPA), 175+ Counties and Cities, Texas, March 2021 – Present, Grant Amount: \$800 million

Jo built our ARPA Team from the ground up by studying legislation before the act was passed and working with lobbyist groups while Congress refined the legislation. She stays current with directives, FAQs, Federal Register publications, and interpretive guidance from advocacy groups. She continually educates and provides senior leadership to GrantWorks' 34-member ARPA Team.

Executive Sponsor, Various State Managed Emergency Rental Assistance Programs, Florida and Texas, February 2021 – Present

Jo provides contract support and SME consultation to managers and staff who work on CARES Act programs. These programs provide rental and utility relief to tenants and landlords who meet eligibility criteria which vary slightly by state.



40 YEARS

GRANT, PROJECT, AND PROGRAM MANAGEMENT EXPERIENCE

COMPANY

GrantWorks, Inc.

EDUCATION

Bachelor of Science, Psychology,
Texas A&M University, College
Station, Texas, 1982

HIGHLIGHTS

Program Manager of four major
CDBG-DR programs, including
New Jersey Hurricane Sandy and
Texas Hurricane Rita, Ike, and
Harvey Programs

39+ years of HUD and CDBG
housing and infrastructure
program management experience

National "HUD Best Practices"
winner for Housing, Public
Services, and Minority Business
Participation

REGISTRATIONS/ CERTIFICATIONS

Certified HOME Program Specialist

PROFESSIONAL AFFILIATIONS

Past memberships on the National
Community Development
Association Committees, National
Affordable Housing Committee,
and National HOME Program
Committee

Past Member of Board of
Directors, NCDA Region VIB

DIRECTOR/SENIOR PROGRAM MANAGER/SENIOR PROJECT MANAGER/ PROJECT MANAGER, APTIM ENVIRONMENTAL & INFRASTRUCTURE, LLC, TRENTON, NEW JERSEY, AND AUSTIN AND HOUSTON, TEXAS, APRIL 2009 – JULY 2020

Program Manager, New Jersey Reconstruction, Rehabilitation, Elevation, Mitigation (RREM) Program, New Jersey Department of Community Affairs, Trenton, New Jersey, May 2013 – June 2020

The RREM Program provided disaster housing relief services for over 10,000 homeowners damaged by Superstorm Sandy in nine coastal counties. Jo managed a team of 150+ professionals delivering program management services, including policy development, damage assessments, environmental mitigation, CDBG-DR expertise, case management, call center operations, construction oversight and inspections, and compliance monitoring. Program activities include rehabilitation, reconstruction, elevation, mitigation, resiliency, demolition, lead paint/asbestos assessments and clearances, construction management, and engineering design services. The project team completed construction following HUD, HQS, NJDCA Construction Standards, the International Residence Code (IRC), Energy Star, and HUD's CPD Green Building Checklist. She provided all aspects of program management, and her team of policy, environmental, and construction professionals provided leadership and oversight for program design and construction management.

Program Manager, Build it Forward Programs Master Program Manager, City of Houston Housing Community Development Department, Houston, Texas, January 2018 – July 2019

The City of Houston Hurricane Harvey Recovery Programs used \$450 million FEMA and \$1.2 billion CDBG-DR funding to assist homeowners and renters damaged or displaced by Hurricane Harvey. The project team served as the Master Program Management firm engaged to assist in the overall administration of the multiple programs, including providing comprehensive case management services and developing and operating a call center to handle inbound and outbound calls for program applicants. As the Program Manager, Jo managed a team of 80+ professionals delivering program guidelines and workflows, compliance, and advising the City regarding policy and procedures.

Policy and Process Coordinator, Program Management Services for the FEMA Rapid Repairs Program, New York, New York, November 2012 – February 2013

The New York City Rapid Repairs Program provided emergency temporary repair services (limited to essential power, heat, and hot water) for residents affected by Superstorm Sandy, allowing them to remain or return to their homes. Jo designed and developed program policies, including policies for case management in compliance with local, state, and federal requirements to define the program workflow and provide a systemic, consistent approach for delivering services. Since the program was the first-of-its-kind to provide shelter-in-place, a major challenge was identifying potential situations and issues pre-planning resolution through developing general operating policies. Because of her experience and knowledge of managing other CDBG-DR programs, Jo quickly provided general guidelines to kick-start program implementation.

EMPLOYMENT HISTORY

- ▶ Senior Vice President of Operations, GrantWorks, Inc., Austin, Texas, July 2020 – Present
- ▶ Director/Senior Program Manager, Aptim Environmental & Infrastructure, LLC, Trenton, New Jersey, and Houston, Texas, July 2017 – July 2020
- ▶ Program Manager/Senior Project Manager, CB&I Environmental & Infrastructure, LLC, Trenton, New Jersey, February 2013 – June 2017
- ▶ Project Manager, Shaw Environmental & Infrastructure, Inc., Austin, Texas, April 2009 – February 2013
- ▶ CDBG Independent Consultant, Multiple Cities, Counties, States, Nonprofits, 2000 – April 2009
- ▶ Community Development Director, City of College Station, Texas, 1990 – 2000
- ▶ Deputy Director/Director, Brazos Valley Council of Governments, Bryan, Texas, 1980 – 1990



KEN PEVOVAR, PMP

SUBJECT MATTER EXPERT

PROFESSIONAL QUALIFICATIONS

Ken Pevovar has 16 years of experience managing public infrastructure, FEMA, and CDBG-DR projects in every stage of the lifecycle, from initiation to close-out. Ken has diverse training in construction, education, and management. He received HUD training in CDBG-DR grant management and is certified at the Master level for the industry-leading Xactimate 28 estimating software system. He is a PMI-certified project manager who brings significant infrastructure experience from designing and installing city and county communications/network operations centers and a pipeline and metering station project for a proposed power plant. His expertise in disaster recovery began as a Red Cross Disaster Services volunteer and shelter manager.

RELEVANT EXPERIENCE

SENIOR VICE PRESIDENT OF PROGRAM MANAGEMENT, GRANTWORKS, INC., AUSTIN, TEXAS, JULY 2020 – PRESENT

As Senior Vice President at GrantWorks, Ken provides leadership and managerial expertise in delivering multiple operations and programs. His expertise centers on HUD CDBG/CDBG-DR, ARPA, COVID-19, CARES Act, FEMA, and other state/federal programs.

Executive Sponsor/Subject Matter Expert, American Rescue Plan Act, Counties and Cities, Texas, March 2021 – Present

Ken pioneered our ARPA Team by studying legislation before the act was passed and worked with lobbyist groups while it was refined. He stays current with directives, FAQs, Federal Register publications, and interpretive guidance from advocacy groups and continually educates and provides senior leadership to the team.

Executive Sponsor, Various State Managed Emergency Rental Assistance Programs, Florida and Texas, February 2021 – Present

Ken provides contract support and SME consultation to managers and staff who work on CARES Act and ARPA-funded programs. These programs provide rental and utility relief to tenants and landlords who meet eligibility criteria which vary slightly by state.

DIRECTOR/SENIOR PROGRAM MANAGER/SENIOR PROJECT MANAGER/PROJECT MANAGER/ CONSTRUCTION MANAGER, APTIM ENVIRONMENTAL & INFRASTRUCTURE, LLC, TRENTON, NEW JERSEY, AND HOUSTON, TEXAS, MAY 2015 – JULY 2020 **Program Manager, Supplemental Fund Program, New Jersey Department of Community Affairs, Trenton, New Jersey, August 2019 – November 2019**



16 YEARS

PROJECT & CONSTRUCTION MANAGEMENT EXPERIENCE

COMPANY

GrantWorks, Inc.

EDUCATION

Bachelor of Science, Biology,
Monmouth University, West Long
Branch, New Jersey, 1997

HIGHLIGHTS

Developed a successful change
management System for the State
of New Jersey

Disaster recovery conference
speaker and panel presenter

Managed FEMA's first permanent
repairs program (DALHR)

Executed three FEMA task orders in
the Northern Mariana Islands

Spearheaded the creation of the
ARPA Team to provide specialized
services to local government

CERTIFICATIONS/ REGISTRATIONS

Certified Project Management
Professional (PMP), Project
Management Institute, Certification
No. 1935804

Xactimate Master Level 3
Certification, Certificate No. 150321

The NJDCA developed the Supplemental Fund Program to assist homeowners previously accepted into either NJ's RREM or LMI programs but had not yet completed the construction of their primary residence. The program aimed to quantify unmet needs and allocate funds for those activities. Ken managed a team of six, providing review and quality control of baseline site assessments, project funding audits, and reconciliation services supporting the NJDCA. He worked with NJDCA to create and update policy, ensuring the program followed best practices and processes aligned with CDBG-DR regulations.

Subject Matter Expert, Repair, Reconstruction, or Relocation (R3) Program, Puerto Rico Department of Housing/ICF International, San Juan, Puerto Rico, April 2019 – June 2020

After authoring the technical proposal for this program with ICF, Ken served as a consultant for preconstruction services on the R3 CDBG-DR housing recovery program. In this as-needed role, he has developed inspection protocols, written policies, guidelines, and SOPs and provided consultation and guidance to field teams operating on the island. In February 2020, his role expanded to providing construction inspection guidance.

Senior Construction Manager, Build it Forward Houston, City of Houston Housing and Community Development Department, Houston, Texas, July 2018 – August 2019

Ken served as the Senior Construction Manager for CDBG-DR housing recovery programs. The Build it Forward programs included repair, elevation, and reconstruction of single-family dwellings, the landlord (small rental), and new home buyer assistance. He managed procurements, wrote construction-related policies, developed guidelines and SOPs, and provided consultation and guidance to the City's senior management team.

Program Manager, Master Program Manager for Disaster Recovery Projects, City of Houston Housing and Community Development Department, Houston, Texas, January 2018 – October 2018

Ken served as Program Manager for the FEMA Individual Assistance (IA) Direct Assistance for the Limited Home Repair (DALHR) Program. This program provided permanent home repair to 185 non-substantially damaged homes within the City of Houston. Ken and his team developed program policies, SOPs, and forms in line with guidelines provided by the Texas General Land Office (GLO). He supervised staff, including case managers, inspectors, construction managers, estimators, and close-out specialists.

Senior Construction Manager, New Jersey Reconstruction, Rehabilitation, Elevation, Mitigation (RREM), New Jersey Department of Community Affairs, Trenton, New Jersey, March 2015 – January 2018

The New Jersey RREM is a disaster recovery program initiated after Superstorm Sandy to rebuild, repair, or mitigate residential properties. On this project, he served in many different roles. As part of the Program Management Team, Ken conducted site inspections and managed the inspection team. While he managed a team of field assessors and quality control personnel, Ken developed protocols, training modules, SOPs, and schedules. Ken created data collection tools and organizational processes for construction managers in the field and refined scopes of work for program contractors. He developed and implemented training modules for construction managers and served as a subject matter expert for the Xactimate estimating software package. He also created the scope adjustment process and managed a staff of 16 adjusters. Ken developed cost estimation tools for the program's home elevation program.

EMPLOYMENT HISTORY

- ▶ Senior Vice President of Program Management, GrantWorks, Inc., Austin, Texas, July 2020 – Present
- ▶ Director of Operations/Senior Program Manager/Senior Project Manager, Aptim Environmental & Infrastructure, LLC, Houston, Texas, July 2017 – June 2020
- ▶ Construction Manager, CB&I Environmental & Infrastructure, LLC, Houston, Texas, May 2015 – June 2017
- ▶ Project Manager, 3-D Engineering, Wall Township, New Jersey, February 2011 – May 2015



ERIN DEADY, ESQUIRE, AICP

SUBJECT MATTER EXPERT AND GRANT WRITER

PROFESSIONAL QUALIFICATIONS

Erin Deady has significant management experience on numerous complex projects involving climate legal, policy, and planning elements, including vulnerability analyses and integration of adaptation responses into Comprehensive Plans. Erin has worked on multiple sustainability, climate, and energy planning efforts around the state for large and small local governments. She has published numerous articles and resources related to the planning and legal issues surrounding resiliency and adaptation planning strategies. A cornerstone of this experience includes developing and implementing public engagement and outreach strategies to support local government policy and decision-making processes.

RELEVANT EXPERIENCE

PRESIDENT, ERIN L. DEADY, PA, DELRAY BEACH, FLORIDA, 2011 - PRESENT

Project Manager, City of Delray Beach Comprehensive Plan Update, Delray Beach, Florida

Erin worked with the City of Delray Beach to develop a comprehensive plan update for its 2019 effort. The plan comprised data, analysis, goals, objectives, and policies to comply with Chapter 163, F.S., including Section 163.3178, F.S. related to the coastal element and new peril of flood requirements. The new Comprehensive Plan Elements are grouped into four themes: Live, Work, Plan, and Grow. The City's effort included an entire rewrite of the Comprehensive Plan. Erin drafted amendment language for the Coastal, Conservation, Sustainability, and Resiliency element (new and expanded), the Open Space, Parks and Recreation, and Public Facilities Elements.

Project Manager, Monroe County Peril of Flood Amendments, Monroe County, Florida

Erin worked with Monroe County to develop its Peril of Flood amendments for its EAR-based amendments in 2019-2020. The language included analysis, goals, objectives, and policies to comply with Chapter 163, F.S., including Section 163.3178, F.S. related to the Coastal element and new peril of flood requirements.

Project Manager, Town of Briny Breezes Peril of Flood Amendments, Briny Breezes, Florida

Erin worked with the Town of Briny Breezes to develop its Peril of Flood amendments for its EAR-based amendments in 2019-2020. The language included analysis, goals, objectives, and policies to comply with Chapter 163, F.S., including Section 163.3178, F.S. related to the



27+ YEARS

MANAGEMENT EXPERIENCE

COMPANY

Erin L. Deady, P.A.

EDUCATION

Juris Doctorate, Nova
Southeastern University, Shepard
Broad Law Center, 2000

Master Public Administration,
Environmental Growth
Management, Florida Atlantic
University, 1996

Master of Public Administration,
University of the Virgin Islands,
1995

Bachelor of Arts, Marine Science
Affairs, University of Miami, Miami,
Florida, 1993

HIGHLIGHTS

Expertise in grant funding,
sustainability and climate planning,
energy conservation, land use, and
environmental restoration

REGISTRATIONS/ CERTIFICATIONS

Certified Planner, American
Institute of Certified Planners
(AICP)

Florida Bar No. 367310, 2000 -
Present

PROFESSIONAL AFFILIATIONS

Member, American Institute of
Certified Planners

Member, Florida Chapter of the
American Planning Association

Coastal element and new peril of flood requirements. The analysis also included mapping and supporting data and analysis.

Project Manager, City of West Palm Beach Peril of Flood Amendments, West Palm Beach, Florida

Erin worked with the Town of Briny Breezes to develop its Peril of Flood amendments for its EAR-based amendments in 2017. The language included analysis, goals, objectives, and policies to comply with Chapter 163, F.S., including Section 163.3178, F.S. related to the Coastal element and new peril of flood requirements. The analysis also included mapping and supporting data and analysis.

Project Manager, City of Pensacola Peril of Flood Amendments, Pensacola, Florida

Erin worked with the City of Pensacola to develop its Peril of Flood amendments for its EAR-based amendments in 2017. The language included analysis, goals, objectives, and policies to comply with Chapter 163, F.S., including Section 163.3178, F.S. related to the Coastal element and new peril of flood requirements. The analysis also included mapping and supporting data and analysis, including the City's first Vulnerability Assessment.

Project Manager, Coastal Resources Partnership, Adaptation Action Areas, 7 Cities, Palm Beach County, Florida

Erin developed a model of Adaptation Action Areas (AAAs) goals, objectives, and policies that can be used in all the jurisdictions' Comprehensive Plan Coastal Elements. The approach was to develop three different kinds of AAAs for natural areas, infrastructure, and neighborhoods capturing the different types of adaptation responses that would be needed based on the vulnerability of that asset class. Erin developed the mapping approach for identifying the three types of AAAs. She also analyzed each participant's Coastal elements for consistency with the proposed goals, objectives, and policies and created memoranda for each jurisdiction, including that analysis.

Project Manager, Monroe County, Adaptation Action Areas, Monroe County, Florida

Erin developed a model of Adaptation Action Areas (AAAs) goals, objectives, and policies for the Conservation and Coastal Element. The approach was to develop three different kinds of AAAs for natural areas, infrastructure, and neighborhoods capturing the different types of adaptation responses that would be needed based on the vulnerability of that asset class. The firm also developed the mapping approach for identifying the three different types of AAAs. The County is beginning the adoption process of the amendments in 2022.

Project Manager, Model Shoreline Ordinance, Tampa Bay Regional Planning Council, Florida

Erin assisted the Tampa Bay Regional Planning Council to develop a Model Shoreline Ordinance to address seawalls and hybrid and natural shorelines, including living shorelines. Erin conducted legal research and served as the primary draft of the Ordinance, which the Tampa Bay Regional Planning Council accepted on September 12, 2022.

Grant Writer, Resilient Florida Grant Applications

Erin authored 63 Resilient Florida grant applications for both inland and coastal communities for planning and capital project applications. This includes grants from the program's inception five years ago before the 2021 Section 380.093, F.S. legislation took effect. Eighty percent of these grants have either been awarded or are pending award.

EMPLOYMENT HISTORY

- ▶ President, Erin L. Deady, P.A., Delray Beach, Florida, 2011 – Present
- ▶ Shareholder, Lewis, Longman & Walker, PA, 2008 – 2011
- ▶ Environmental Counsel, Audubon of Florida, 1997 – 2003
- ▶ Fellowship, Urban and Environmental Solutions, Florida Atlantic University, 1995 - 1997



JULIE DENNIS

SUBJECT MATTER EXPERT AND GRANT WRITER

PROFESSIONAL QUALIFICATIONS

For the City of Key West, Julie Dennis will find funding opportunities and write proposals for grant funds, including researching deadlines, drafting grant requests, and submitting proposals for approval. Before founding OVID Solutions, Julie served as the top Community Development Official for the State of Florida, managing most of the state funds available to rural communities to grow their economy, over \$100 million in federal non-entitlement grant funds, and billions of dollars appropriated following disasters. She has a diverse background in federal grant programs and knows how to help the City responsibly and transparently manage any grant funds.

RELEVANT EXPERIENCE

OWNER, OVID SOLUTIONS, LLC, WAKULLA COUNTY, FLORIDA, FEBRUARY 2019 – PRESENT

- ▶ Advised Bay County on housing recovery in the wake of Category 5 Hurricane Michael through the development of policies and procedures for over \$40 million in Hurricane Housing Recovery Program funding
- ▶ Created strategies to help Calhoun County, Liberty County, and the City of Apalachicola secure millions in recovery funding to refuel local economies following Hurricane Michael
- ▶ Created a \$150 million recovery plan for the Florida Keys following Hurricane Irma, along with a post-disaster plan for Hallandale Beach
- ▶ Worked with the State of California, Butte County, and the Town of Paradise to evaluate unmet recovery needs following the devastating wildfire that wiped the Town of Paradise off the map
- ▶ Secured nearly \$30 million in CDBG-DR funding to support communities impacted by Hurricane Michael, including the only direct allocation of funding for Calhoun-Liberty Hospital
- ▶ Serve as the Economic Development Coordinator for the Wakulla Economic Development Council, a public-private partnership

DIRECTOR, DIVISION OF COMMUNITY DEVELOPMENT, FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY, TALLAHASSEE, FLORIDA, FEBRUARY 2017 – JANUARY 2019

- ▶ Oversaw the management of hundreds of millions in state non-entitlement funding for the following programs: CDBG, CSBG, LIHEAP, and WAP, including the development of the State Consolidated Plan and annual reporting requirements
- ▶ Advised the Executive Director on how to solve complex community issues, including the redevelopment of the state in the wake of Hurricanes Irma and Michael



20+ YEARS

MANAGEMENT EXPERIENCE

COMPANY

OVID Solutions, LLC

EDUCATION

Master of Science, Urban & Regional Planning, Florida State University

Bachelor of Science, Political Science, Florida State University

HIGHLIGHTS

Served on the Florida Housing Finance Corporation Board of Directors

Serves on the Florida Workforce Development Association Board of Directors

Created a plan to spend \$1.6 billion in CDBG-DR funding, which addressed long-term recovery needs following Hurricane Irma

Secured more than \$40 million in long-term recovery funding for clients impacted by Hurricane Michael, including the only direct line-item allocation

Advising Bay County on the redevelopment of housing programs following Hurricane Michael

Served in an advisory capacity for FEMA when developing the National Disaster Recovery Framework

- ▶ Served on the Board of Directors for the Florida Housing Finance Corporation, a public-private partnership that allocates hundreds of millions of dollars to support affordable housing needs
- ▶ Worked closely with Congressional leaders, State Senators and Representatives, and local elected officials to solve challenges in their districts

EXECUTIVE STAFF DIRECTOR, DIVISION OF COMMUNITY DEVELOPMENT, FLORIDA DEPARTMENT OF ECONOMIC DEVELOPMENT, TALLAHASSEE, FLORIDA, MARCH 2015 – FEBRUARY 2017

- ▶ Functioned as the Chief of Staff for the Division of Community Development, assisting with all aspects of leading a division that helps cities and counties accomplish their goals through community and economic development
- ▶ Coordinated the division management team to meet deadlines and complete projects
- ▶ Connected local organizations to remove barriers to employment and help people get a job through integrating the efforts of local community action agencies and workforce boards
- ▶ Managed an annual allocation of \$100 million in federal funding to help boost the lives of people who need a hand up and help communities thrive by strengthening infrastructure through the Community Development Block Grant Program, Low-Income Home Energy Assistance Program, and Weatherization Assistance Program

COMMUNITY PROGRAM MANAGER, FLORIDA DEPARTMENT OF ECONOMIC DEVELOPMENT, TALLAHASSEE, FLORIDA, OCTOBER 2013 – FEBRUARY 2015

- ▶ Developed Competitive Florida, a program that assists rural areas in Florida by helping them set realistic goals for advancing their local economy based on unique local assets such as a historic downtown, proximity to interstates or rail, and natural resources
- ▶ Worked with state legislators to secure dedicated funding for this program
- ▶ Over 20 communities have participated in the program, including Port St. Joe, Gadsden County, Sopchoppy, and the Town of White Springs

PLANNING ANALYST, FLORIDA DEPARTMENT OF ECONOMIC DEVELOPMENT, TALLAHASSEE, FLORIDA, 2009 – 2013

- ▶ Managed programs focused on waterfront revitalization, post-disaster redevelopment, and sea level rise adaptation planning
- ▶ Advised federal officials on the development of long-term recovery coursework for state and local governments and published articles and presented at national conferences on working waterfronts preservation, sea level rise adaptation, and disaster recovery

EMPLOYMENT HISTORY

- ▶ Owner, OVID Solutions, LLC, Wakulla County, Florida, February 2019 – Present
- ▶ Director, Division of Community Development, Florida Department of Economic Opportunity, Tallahassee, Florida, February 2017 – January 2019
- ▶ Executive Staff Director, Division of Community Development, Florida Department of Economic Development, Tallahassee, Florida, March 2015 – February 2017
- ▶ Community Program Manager, Florida Department of Economic Development, Tallahassee, Florida, October 2013 – February 2015
- ▶ Planning Analyst, Florida Department of Economic Development, Tallahassee, Florida, 2009 – 2013
- ▶ Community Planner, CSA Ocean Sciences, Inc., Stuart, Florida 2005 – 2009
- ▶ Hazard Mitigation Planner, Federal Emergency Management Agency, Region IV, Atlanta, Georgia, 2005 – 2006



DORNECIA ALLEN, CPM, FCCM, FCCM

GRANT WRITER & ADMINISTRATOR

PROFESSIONAL QUALIFICATIONS

As a third-generation Florida native, Dornecia Allen is a trusted advisor for government, nonprofit, and local leaders with nearly two decades of experience in contracts and grants administration. She also finds funding opportunities and writes proposals for grant funds, including researching deadlines, drafting grant requests, and submitting proposals for approval, and has managed over 60 grants annually. Dornecia develops strategies to assist communities with securing project funding to refuel local economies following disasters, advises communities on the development of policies and procedures for grant funding, and assists organizations with the management of grant awards to ensure compliance with the terms of the agreement and all local, state, and federal regulations.

RELEVANT EXPERIENCE

GRANTS MANAGER DIRECTOR, OVID SOLUTIONS, LLC, WAKULLA COUNTY, FLORIDA, APRIL 2022 – PRESENT

- ▶ Lead grant writer and manager for OVID Solutions
- ▶ Develops strategies to assist communities with securing project funding to refuel local economies following disasters
- ▶ Advises communities on the development of policies and procedures for grant funding.
- ▶ Assists organizations with the management of grant awards to ensure compliance with the terms of the agreement and all state and federal regulations

CONTRACTS & GRANT MANAGER, DIVISION OF FINANCIAL ADMINISTRATION, FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY, TALLAHASSEE, FLORIDA, SEPTEMBER 2015 – APRIL 2022

- ▶ Served as the Department's Contract Administrator for the entire agency, ensuring compliance with state, federal, and Department contract laws, rules, and policies
- ▶ Facilitated the establishment of the grants management unit and tracking of agreements through the Department's review and approval process, including the coordination of the agreement review and approval from other Department offices
- ▶ Worked closely with the CDBG, CDBG-DR, RIF grant programs, and other key stakeholders on contract and grant-related issues, training, and process improvements
- ▶ Assisted the Department's purchasing staff with developing formal and informal solicitations, pre-bid conferences, evaluation training, and the administrative work associated with these tasks



19 YEARS

GRANT MANAGEMENT EXPERIENCE

COMPANY

OVID Solutions, LLC

EDUCATION

Master of Public Administration,
Kaplan University

Bachelor of Science, Political
Science, Florida A&M University

HIGHLIGHTS

Managed over 60 grants annually with local governments, nonprofits, and state agencies

Analyzed and interpreted state and federal rules, regulations, and statutes for CDBG, CDBG-DR, CDBG-CV, Rural Infrastructure Fund, and more

Established the Contracts and Grants Administration Unit to provide a streamlined approach to the oversight of all DEO contracts and grants

CERTIFICATIONS/ REGISTRATIONS

Florida Certified Contract Manager, Florida Department of Management Services, August 2019

Florida Certified Contract Negotiator, Florida Department of Management Services, April 2018

Certified Public Manager, Florida State University, September 2020

**OPERATIONS MANAGEMENT CONSULTANT MANAGER, DIVISION OF ADMINISTRATIVE SERVICES
FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION, TALLAHASSEE, FLORIDA, SEPTEMBER
2013 – SEPTEMBER 2015**

- ▶ Supervised and trained the staff responsible for the development and review of grants issued by the Department to governmental entities, nonprofit and for-profit organizations
- ▶ Reviewed and approved the grant agreement templates for the Department's grant agreements and ensured that the agreements meet all of the applicable state and federal requirements
- ▶ Monitored the Department's decentralized grant programs to ensure compliance with the Department's policies and procedures and all state and federal regulations
- ▶ Oversaw the annual Single Audit Certification process and served as liaison to the DEP's Office of Inspector General and the program areas regarding the Florida Single Audit Act

**GRANT MANAGER, FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION, TALLAHASSEE,
FLORIDA, APRIL 2004 – SEPTEMBER 2013**

- ▶ Developed and implemented policies related to Florida Coastal Management Program subgrant administration, directed the administration of subgrants, and coordinated with subgrantees on project implementation
- ▶ Drafted grant agreements, amendments, and related correspondence following applicable state and federal rules, regulations, and statutes
- ▶ Monitored projects throughout the duration of the agreement
- ▶ Assisted with the annual National Oceanic and Atmospheric Administration federal application and semi-annual progress reporting
- ▶ Prepared periodic reports on grant progress and expenditure levels
- ▶ Assisted with necessary revisions to the program rule and the annual evaluation of subgrant funding applications

**GRANT SPECIALIST, FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION, TALLAHASSEE,
FLORIDA, 2003 – 2004**

- ▶ Maintained expenditure documentation and reports for the Florida Coastal Management Program federal cooperative award
- ▶ Conduct daily and weekly audits between the State and Program expenditure records to ensure accuracy
- ▶ Assisted with the annual National Oceanic and Atmospheric Administration federal application and semi-annual progress reporting
- ▶ Prepared periodic reports on grant progress and expenditure levels
- ▶ Assisted with the review of project work plans and quarterly reports
- ▶ Assisted with the annual evaluation of subgrant funding applications

EMPLOYMENT HISTORY

- ▶ Grants Manager Director, OVID Solutions, LLC, Wakulla County, Florida, April 2022 – Present
- ▶ Contracts & Grant Manager, Division of Financial Administration, Florida Department of Economic Opportunity, Tallahassee, Florida, September 2015 – April 2022
- ▶ Operations Management Consultant Manager, Division of Administrative Services, Florida Department of Environmental Protection, Tallahassee, Florida, September 2013 – September 2015
- ▶ Grant Manager, Florida Department of Environmental Protection, Tallahassee, Florida, April 2004 – September 2013
- ▶ Grant Specialist, Florida Department of Environmental Protection, Tallahassee, Florida, 2003 – 2004
- ▶ Staff Assistant, Florida Fish & Wildlife Conservation Commission, St. Petersburg, Florida, 2002 – 2003



SHAWNA MARTIN, AICP

GRANT WRITER

PROFESSIONAL QUALIFICATIONS

For the City of Key West, Julie Dennis will find funding opportunities and write proposals for grant funds, including researching deadlines, drafting grant requests, and submitting proposals for approval. Before founding OVID Solutions, Julie served as the top Community Development Official for the State of Florida, managing most of the state funds available to rural communities to grow their economy, over \$100 million in federal non-entitlement grant funds, and billions of dollars appropriated following disasters. She has a diverse background in federal grant programs and knows how to help the City responsibly and transparently manage any grant funds.

RELEVANT EXPERIENCE

STRATEGIC PLANNING AND GRANTS DEVELOPMENT DIRECTOR, OVID SOLUTIONS, LLC, TALLAHASSEE, FLORIDA, APRIL 2022 – PRESENT

- ▶ Lead strategic and urban planner for OVID Solutions
- ▶ Connecting communities to funding opportunities that help implement vital public infrastructure, planning, and strategic vision initiatives
- ▶ Creating strategies to help communities secure funding to refuel local economies, including large infrastructure projects
- ▶ Developing competitive grant applications that tell the story of the need specific to each client
- ▶ Advising local governments and nonprofits on land use, site planning, stakeholder engagement, and other development policies

DEVELOPMENT SERVICES ADMINISTRATOR, 2020 – 2022 | PRINCIPAL PLANNER, 2016 – 2020 | SENIOR PLANNER, 2014 – 2016, PLANNER, 2012 – 2014, LEON COUNTY DEPARTMENT OF DEVELOPMENT SUPPORT AND ENVIRONMENTAL MANAGEMENT, TALLAHASSEE, FLORIDA, JULY 2012 – JANUARY 2022

- ▶ Led and cross-trained a team of five professional urban planners
- ▶ Aided citizens, developers, and elected officials in navigating the County's land development process
- ▶ Shaped future development by recommending and developing amendments to the Comprehensive Plan and Land Development Regulations. Ordinances written have been related to special zoning districts, urban agriculture, urban design, cell towers, signs, and rural development



11+ YEARS

PLANNING AND PROJECT MANAGEMENT EXPERIENCE

COMPANY

OVID Solutions, LLC

EDUCATION

Master of Science, Urban & Regional Planning, Florida State University

Bachelor of Science, Biological Science, Florida State University

HIGHLIGHTS

Practical experience analyzing and interpreting municipal, state, and federal statutes and codes

Experience and ability in developing a comprehensive plan and land development regulation policies

Exceptional analytical, planning, project management, stakeholder coordination, team building, and community involvement skills

Effective public speaking, facilitation, and presentation skills

CERTIFICATIONS/ REGISTRATIONS

Certified Planner, American Institute of Certified Planners (AICP)

- ▶ Listened to and provided flexibility in adjusting to the changing needs of the community by embracing innovations and technology
- ▶ Used strategic thinking and high-level problem solving to define, develop and improve County processes and procedures
- ▶ Division liaison to the Board of Adjustment and Appeals, Code Enforcement Board, Planning Commission, and Board of County Commissioners
- ▶ Skilled in ArcGIS Pro and served as the Division's liaison for GIS-related improvements and post-disaster FEMA recovery data

**STAKEHOLDER COORDINATION SPECIALIST/PLANNER, FLORIDA FISH AND WILDLIFE
CONSERVATION DISTRICT COMMISSION, TALLAHASSEE, SEPTEMBER 2011 – JUNE 2012**

- ▶ Functioned as the Stakeholder Coordination Specialist for a grant-funded project to develop management plans for 60 state-listed wildlife species
- ▶ This required statewide coordination with biologists, cross-agency divisions, Regional Planning Councils, Water Management Districts, local governments, large landholders, and special interest groups
- ▶ Developed and managed an efficient stakeholder engagement system that alleviated miscommunication, staff, and stakeholder fatigue and reduced duplications in agency work efforts
- ▶ Engaged stakeholders for effective conservation planning efforts, ensuring stakeholder issues and concerns were understood and appropriately addressed
- ▶ Worked with agency directors to integrate management planning efforts with those of other FWC programs to ensure they were coordinated and effective both internal and external to the agency

**PROGRAM MANAGER, ST. ANDREWS COMMUNITY REDEVELOPMENT AGENCY, CITY OF PANAMA
CITY, FLORIDA, AUGUST 2009 – AUGUST 2011**

- ▶ Managed and implemented the St. Andrews CRA Redevelopment Plan with a programmatic budget of over \$600K
- ▶ Researched, wrote, and secured grant funding for identified projects in the CRA Redevelopment Plan and Waterfronts Florida Vision Plan
- ▶ Assisted with the management of major construction projects, including preparation of requests for proposals, bid openings, and contract awards
- ▶ Worked directly with private landowners to create incentives for urban infill, which included facilitation of land use changes, shortened timeframes for regulatory processes and permitting, and created small grant programs for businesses
- ▶ Surveyed, collected, and compiled demographic, economic, and other community indicator data relevant to municipal conditions that resulted in positive changes to the City's Comprehensive Plan and Land Development Regulations

EMPLOYMENT HISTORY

- ▶ Strategic Planning and Grants Development Director, OVID Solutions, LLC, Tallahassee, Florida, April 2022 – Present
- ▶ Leon County Department of Development Support and Environmental Management, Tallahassee, Florida, July 2012 – January 2022
 - › Development Services Administrator, 2020 – 2022
 - › Principal Planner, 2016 – 2020
 - › Senior Planner, 2014 – 2016
 - › Planner, 2012 – 2014
- ▶ Stakeholder Coordination Specialist/Planner, Florida Fish and Wildlife Conservation District Commission, Tallahassee, September 2011 – June 2012



MOVING FORWARD

