

STATE OF CALIFORNIA

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER
19-CDBGDR-13032
AMENDMENT NUMBER
7
☒ **CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED**

1. CONTRACTOR'S NAME MB3 Inc. dba Civix		2. FEDERAL I.D. NUMBER 47-0949939
3. AGENCY TRANSMITTING AGREEMENT Department of Housing and Community Development	4. DIVISION, BUREAU, OR OTHER UNIT Federal Financial Assistance	5. AGENCY BILLING CODE 035539
6a. CONTRACT ANALYST NAME Karpal Bains	6b. EMAIL Karpal.Bains@hcd.ca.gov	6c. PHONE NUMBER (916) 350-1158

7. HAS YOUR AGENCY CONTRACTED FOR THESE SERVICES BEFORE?

☒ No ☐ Yes (If Yes, enter prior Contractor Name and Agreement Number)

PRIOR CONTRACTOR NAME: N/A PRIOR AGREEMENT NUMBER: N/A

8. BRIEF DESCRIPTION OF SERVICES

Consultant to provide Grant Management Services to aid the State's recovery from wildfires, debris flows, mudslides and floods.

9. AGREEMENT OUTLINE (Include reason for Agreement: Identify specific problem, administrative requirement, program need or other circumstances making the Agreement necessary; include special or unusual terms and conditions.)

Amendment 7 increases the contract amount from \$24,312,980.00 to \$31,606,874.00, adding \$7,293,894.00 in additional funding. This amendment supports the completion of work and capacity building activities for California's Community Development Block Grant-Disaster Recovery (CDBG-DR) program related to the 2023/24 disasters.

The contractor will continue providing disaster recovery grant management services, including assisting local governments, state agencies (including HUD), and sub-grantees with compliance under CDBG-DR requirements in response to flooding impacts in Northern and Southern California.

CDBG-DR funding is appropriated by Congress and allocated by HUD to support reconstruction and long-term recovery in disaster-impacted areas. These services are essential for helping cities, counties, tribal governments, and states recover from Presidentially declared disasters, particularly in low income communities.

10. PAYMENT TERMS (More than one may apply)

- ☐ Monthly Flat Rate ☐ Quarterly ☐ One-Time Payment ☒ Progress Payment
☒ Itemized Invoice ☐ Withhold _____ % ☐ Advanced Payment Not To Exceed _____
☐ Reimbursement / Revenue _____ or _____ %
☐ Other (Explain) _____

11. PROJECTED EXPENDITURES

	FUND TITLE	ITEM	FISCAL YEAR	CHAPTER	STATUTE	PROJECTED EXPENDITURES
☐	Federal Trust Fund	2240-001-0890	19/20	23	2019	\$844,411.25
☐	Federal Trust Fund	2240-10102-0890	19/20	23	2019	\$2,177,218.04
☐	Federal Trust Fund	2240-001-0890	21/22	06	2020	\$2,111,415.78
☐	Federal Trust Fund	2240-00101-0890	21/22	06	2020	\$4,538,351.65
☐	Federal Trust Fund	2240-10102-0890	21/22	06	2020	\$1,441,933.75
☐	Federal Trust Fund	2240-10103-0890	21/22	06	2020	\$6,288,883.90
☐	General Fund	2240-001-0001	21/22	21	2021	\$210,616.25

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7

	FUND TITLE	ITEM	FISCAL YEAR	CHAPTER	STATUTE	PROJECTED EXPENDITURES
 	General Fund	2240-001-0001	22/23	43	2022	\$166,359.63
 	Federal Trust Fund	2240-001-0890	22/23	43	2022	\$333,377.00
 	Federal Trust Fund	2240-10102-0890	22/23	43	2022	\$606,397.51
 	Federal Trust Fund	2240-001-0890	23/24	12	2023	\$586,020.44
 	Federal Trust Fund	2240-00101-0890	23/24	189	2023	\$525,395.35
 	Federal Trust Fund	2240-102-0890	23/24	12	2023	\$924,749.91
 	Federal Trust Fund	2240-001-0890	24/25	22	2024	\$1,075,454.46
 	Federal Trust Fund	2240-10103-0890	24/25	06	2020	\$498,483.10
 	Federal Trust Fund	2240-102-0890	24/25	22	2024	\$90,055.00
 	Federal Trust Fund	2240-101-0890	24/25	22	2024	\$387,241.25
 	Federal Trust Fund	2240-00101-0890	25/26	04	2025	\$400,000.00
 	Federal Trust Fund	2240-102-0890	25/26	04	2025	\$690,000.00
 	Federal Trust Fund	2240-102-0890	25/26	12	2023	\$100,000.00
 	Federal Trust Fund	2240-001-0890	25/26	04	2025	\$180,000.00
 	Federal Trust Fund	2240-10102-0890	26/27	23	2019	\$119,928.73
 	Federal Trust Fund	2240-00101-0890	26/27	06	2020	\$276,107.83
 	Federal Trust Fund	2240-10102-0890	26/27	06	2020	\$89,604.56
 	Federal Trust Fund	2240-10103-0890	26/27	06	2020	\$975,656.63
 	Federal Trust Fund	2240-00101-0890	26/27	189	2023	\$49,961.46
 	Federal Trust Fund	2240-102-0890	26/27	12	2023	\$288,081.25
 	Federal Trust Fund	2240-00101-0890	26/27	22	2024	\$3,487.50
 	Federal Trust Fund	2240-102-0890	26/27	22	2024	\$395,574.25
 	Federal Trust Fund	2240-00101-0890	26/27	04	2025	\$2,500,000.00
 	Federal Trust Fund	2240-102-0890	26/27	04	2025	\$2,127,952.52
 	Federal Trust Fund	2240-001-0890	26/27	TBD	TBD	\$200,000.00
 	Federal Trust Fund	2240-101-0890	26/27	TBD	TBD	\$404,155.00
OBJECT CODE 5340580 - Consulting/Professional Services-External				AGREEMENT TOTAL		\$31,606,874.00

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AGREEMENT NUMBER
19-CDBGDR-13032**AMENDMENT NUMBER**
7**OPTIONAL USE**

See Attached Excel MB3_PO5641 >Optional Use tab.

AMOUNT ENCUMBERED BY THIS DOCUMENT

\$7,293,894.00

PRIOR AMOUNT ENCUMBERED FOR THIS AGREEMENT

\$24,312,980.00

I certify upon my own personal knowledge that the budgeted funds for the current budget year are available for the period and purpose of the expenditure stated above.

TOTAL AMOUNT ENCUMBERED TO DATE

\$31,606,874.00

ACCOUNTING OFFICER'S SIGNATURE

Vinod.ChauhanDigitally signed by Vinod.Chauhan
Date: 2026.07.01 08:23:58 -07'00'

ACCOUNTING OFFICER'S NAME (Print or Type)

Vinod Chauhan

DATE SIGNED

07/01/2026

12. AGREEMENT

AGREEMENT	TERM FROM	TERM THROUGH	TOTAL COST OF THIS TRANSACTION	BID, SOLE SOURCE, EXEMPT
Original	10/29/2019	10/31/2022	\$7,455,905.00	BID
+ - Amendment 1	10/29/2019	10/31/2022	\$0.00	EXEMPT
+ - Amendment 2	10/29/2019	10/31/2022	\$6,187,268.00	EXEMPT
+ - Amendment 3	10/29/2019	10/31/2025	\$220,845.00	EXEMPT
+ - Amendment 4	10/29/2019	10/31/2025	\$185,715.00	EXEMPT
+ - Amendment 5	10/29/2019	10/31/2025	\$7,860,107.50	EXEMPT
+ - Amendment 6	10/29/2019	10/28/2028	\$2,403,139.50	EXEMPT
+ - Amendment 7	10/29/2019	10/28/2028	\$7,293,894.00	EXEMPT
+ - Amendment 8				
TOTAL			\$31,606,874.00	

13. BIDDING METHOD USED

- ☒ Request for Proposal (RFP) (Attach justification if secondary method is used)
 ☐ Use of Master Service Agreement
- ☐ Invitation for Bid (IFB)
 ☐ Exempt from Bidding (Give authority for exempt status)
 ☐ Sole Source Contract (Attach STD. 821)
- ☒ Other (Explain) Amending to exercise option to add future disasters for CDBG-DR programs as detailed in Section 1A of the RFP

*Note: Proof of advertisement in the State Contracts Register or an approved form STD. 821, Contract Advertising Exemption Request, must be attached***14. SUMMARY OF BIDS (List of bidders, bid amount and small business status) (If an amendment, sole source, or exempt, leave blank)****15. IF AWARD OF AGREEMENT IS TO OTHER THAN THE LOWER BIDDER, EXPLAIN REASON(S) (If an amendment, sole source, or exempt, leave blank)****16. WHAT IS THE BASIS FOR DETERMINING THAT THE PRICE OR RATE IS REASONABLE?**

The services were procured from a secondary RFP. In comparison with the rates submitted from other proposals and other contracts with similar services, HCD deemed the rates to be fair and reasonable.

17a. JUSTIFICATION FOR CONTRACTING OUT (Check one)

- ☐ Contracting out is based on cost savings per Government Code 19130(a). The State Personnel Board has been so notified.
- ☐ Not Applicable (Interagency / Public Works / Other _____)

☒ Contracting out is justified based on Government Code 19130(b). When this box is checked, a completed JUSTIFICATION - CALIFORNIA CODE OF REGULATIONS, TITLE 2, SECTION 547.60 must be attached to this document.

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17b. EMPLOYEE BARGAINING UNIT NOTIFICATION

☒ By checking this box, I hereby certify compliance with Government Code section 19132(b)(1).

AUTHORIZED SIGNATURE

Karpal Bains

SIGNER'S NAME (Print or Type)

Karpal Bains

DATE SIGNED

07/02/2026

 18. FOR AGREEMENTS IN EXCESS OF \$5,000: Has the letting of the agreement been reported to the Department of Fair Employment and Housing?
 ☐ No ☒ Yes ☐ N/A

 19. HAVE CONFLICT OF INTEREST ISSUES BEEN IDENTIFIED AND RESOLVED AS REQUIRED BY THE STATE CONTRACT MANUAL SECTION 7.10?
 ☐ No ☒ Yes ☐ N/A

 20. FOR CONSULTING AGREEMENTS: Did you review any contractor evaluations on file with the DGS Legal Office?
 ☒ None on file ☐ No ☐ Yes ☐ N/A

21. IS A SIGNED COPY OF THE FOLLOWING ON FILE AT YOUR AGENCY FOR THIS CONTRACTOR?

A. Contractor Certification Clauses

B. STD 204 Vendor Data Record

☐ No ☒ Yes ☐ N/A☐ No ☒ Yes ☐ N/A

22. REQUIRED RESOLUTIONS ARE ATTACHED

☐ No ☐ Yes ☒ N/A

23. IS THIS A SMALL BUSINESS AND/OR A DISABLED VETERAN BUSINESS CERTIFIED BY DGS?

☒ No ☐ Yes

SB/DVBE Certification Number:

24. ARE DISABLED VETERANS BUSINESS ENTERPRISE GOALS

REQUIRED? (If an amendment, explain changes if any)

☒ No (Explain below) ☐ Yes _____ % of Agreement

Due to the technical nature of the services required and the federal requirements under this agreement, DVBE participation goals were waived for this contract.

25. IS THIS AGREEMENT (WITH AMENDMENTS) FOR A PERIOD OF TIME LONGER THAN THREE YEARS?

☐ No ☒ Yes (If Yes, provide justification below)

Due to the length of the HUD Grants (6-8 years for each allocation), and the urgent need to rebuild communities suffering from disasters, HCD obtained approval from DGS OLS to contract beyond 3 years.

I certify that all copies of the referenced Agreement will conform to the original agreement sent to the Department of General Services.

SIGNATURE

Karpal Bains

NAME/TITLE (Print or Type)

Karpal Bains, Contract Analyst

DATE SIGNED

07/02/26

STATE OF CALIFORNIA

AGREEMENT SUMMARY

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JUSTIFICATION - CALIFORNIA CODE OF REGULATIONS, TITLE 2, SECTION 547.60

In the space provided below, the undersigned authorized state representative documents, with specificity and detailed factual information, the reasons why the contract satisfies one or more of the conditions set forth in Government Code section 19130(b). Please specify the applicable subsection. Attach extra pages if necessary.

GC 19130 (b)(3)

The services contracted are not available within civil service, cannot be performed satisfactorily by civil service employees, or are of such a highly specialized or technical nature that the necessary expert knowledge, experience, and ability are not available through the civil service system.

This is a service contract for federal program technical assistance, program compliance, program management, and disaster recovery program expertise. The technical and complex nature of CDBG-DR funding, along with Subject Matter Expertise (SME) required by the authorizing Federal Register Notice, necessitates procuring technical assistance consultants that are not available within the civil service. This contract provides HCD with training and capacity building in addition to technical support for compliant development, launch, and operation of HCD's disaster recovery grants.

GC 19130(b)(10)

The services are of such an urgent, temporary, or occasional nature that the delay incumbent in their implementation under civil service would frustrate their very purpose.

CDBG-DR allocations are special appropriations that do not occur on any regular cycle and are occasional in nature. The funds are appropriated only in association with California's presidentially declared disasters, the very nature of which requires urgency in moving funds into programs to assist the State's disaster impacted residents

The undersigned represents that, based upon his or her personal knowledge, information or belief the above justification correctly reflects the reasons why the contract satisfies Government Code section 19130(b).

SIGNATURE <i>Karpal Bains</i>	NAME/TITLE (Print or Type) Karpal Bains, Contract Analyst	DATE SIGNED 07/02/2026	
PHONE NUMBER (916) 350-1158	STREET ADDRESS 651 Bannon Street, Suite 400		
EMAIL Karpal.Bains@hcd.ca.gov	CITY Sacramento	STATE CA	ZIP 95811

SFY	F\$ Approp	Statute	Chapter	Item #	Reporting Structure	Service Location	Am.7 - 05.28.26	STD 215 Am.7 - 05.28.26
19/20	0890 2019 001 1665	2019	23	2240-001-0890		44441		\$ 844,411.25
19/20	0890 2019 1011 1665	2019	23	2240-10102-0890		46440		\$ 2,177,218.04
19/20						46440		
19/20						46443		
21/22	0890 2020 001 1665	2020	6	2240-001-0890		44441		\$ 2,111,415.78
21/22						44443		
21/22						44445		
21/22						44446		
21/22						44447		
21/22	0890 2020 0011 1665	2020	6	2240-00101-0890		44445		\$ 4,538,351.65
21/22					22402540	44445		
21/22						44446		
21/22						44446	\$ (41,208.35)	
21/22	0890 2020 1011 1665	2020	6	2240-10102-0890	22402000	46440		\$ 1,441,933.75
21/22						46443		
21/22						46443		
21/22						46445		
21/22	0890 2020 1012 1665	2020	6	2240-10103-0890	22402000	46445		\$ 6,288,883.90
21/22						46446		
21/22						46447		
21/22						46447		
21/22	0001 2021 001 1665	2021	21	2240-001-0001		44022		\$ 210,616.25
22/23	0001 2022 001 1665	2022	43	2240-001-0001		44022		\$ 166,359.63
22/23	0890 2022 001 1665	2022	43	2240-001-0890		44441		\$ 333,377.00
22/23						44443		
22/23	0890 2022 1012 1665	2022	43	2240-10102-0890	22402000	46044		\$ 606,397.51
22/23						46044		
23/24	0890 2023 001 1665	2023	12	2240-001-0890		44441		\$ 586,020.44
23/24						44449		
23/24	0890 2023 0011 1665	2023	189	2240-00101-0890		44450		\$ 525,395.35
23/24						44450		
23/24	0890 2023 102 1665	2023	12	2240-102-0890		46043		\$ 924,749.91
23/24						46043		
24/25	0001 2024 001 1665	2024	22	2240-001-0001		44022		\$ -
24/25	0890 2024 001 1665	2024	22	2240-001-0890		44441		\$ 1,075,454.46
24/25						44441	\$ (44,713.23)	
24/25					22402540	44449	\$ (20,724.90)	
24/25					22402540	44449		
24/25					22402540	44454		
24/25					22402540	44455		
24/25					22402540	44048		
24/25					22402540	44453		
24/25	0890-2024-101-1665	2024	22	2240-101-0890	22402000	46453		\$ 387,241.25
24/25					22402000	46453		
24/25	0890-2020-1012-1665	2020	6	2240-10103-0890	22402000	46446		\$ 498,483.10
24/25					22402000	46446		

SFY	F\$ Approp	Statute	Chapter	Item #	Reporting Structure	Service Location	Am.7 - 05.28.26	STD 215 Am.7 - 05.28.26
24/25	0890-2024-102-1665	2024	22	2240-102-0890	22402000	46047		\$ 90,055.00
24/25					22402000	46047		
24/25					22402000	46048		
24/25					22402000	46048		
25/26	0890-2023-102-1665	2023	12	2240-102-0890	22402000	46043		\$ 100,000.00
25/26	0890-2025-0011-1665	2025	4	2240-00101-0890	22402540	44500		\$ 400,000.00
25/26	0890-2025-102-1665	2025	4	2240-102-0890	22402000	46500		\$ 690,000.00
25/26						46470		
25/26	0890-2025-001-1665	2025	4	2240-001-0890	22402540		\$ (29,969.25)	\$ 180,000.00
						44443		
						44470		
26/27	0890-2019-1011-1665	2019	23	2240-10102-0890	22402000	46440	\$ 119,928.73	\$ 119,928.73
26/27	0890-2020-0011-1665	2020	6	2240-00101-0890	22402540	44445	\$ 276,107.83	\$ 276,107.83
26/27	0890 2020 1011 1665	2020	6	2240-10102-0890	22402000	46443	\$ 89,604.56	\$ 89,604.56
26/27	0890 2020 1012 1665	2020	6	2240-10103-0890	22402000	46445	\$ 605,947.61	\$ 975,656.63
						46447	\$ 79,220.00	
						46446	\$ 290,489.02	
26/27	0890 2023 0011 1665	2023	189	2240-00101-0890	22402540	44450	\$ 49,961.46	\$ 49,961.46
26/27	0890-2023-102-1665	2023	12	2240-102-0890	22402000	46043	\$ 288,081.25	\$ 288,081.25
25/26	0890-2024-0011-1665	2024	22	2240-00101-0890	22402540	44454	\$ 3,487.50	\$ 3,487.50
26/27	0890-2024-102-1665	2024	22	2240-102-0890	22402000	46047	\$ 134,512.50	\$ 395,574.25
						46048	\$ 261,061.75	
26/27	0890-2025-0011-1665	2025	4	2240-00101-0890	22402540	44500	\$ 2,500,000.00	\$ 2,500,000.00
26/27	0890-2025-102-1665	2025	4	2240-102-0890	22402000	46500	\$ 1,938,355.27	\$ 2,127,952.52
						46470	\$ 189,597.25	
26/27	0890-2026-001-1665	TBD	TBD	2240-001-0890	22402540	44470	\$ 200,000.00	\$ 200,000.00
26/27	0890-2026-101-1665	TBD	TBD	2240-101-0890	22402000	46453	\$ 404,155.00	\$ 404,155.00
	Grand Total						\$ 7,293,894.00	\$ 31,606,874.00

STANDARD AGREEMENT - AMENDMENT

STD 213A (Rev. 4/2020)

☒ CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED 28 PAGESAGREEMENT NUMBER
19-CDBGDR-13032AMENDMENT NUMBER
7Purchasing Authority Number
2240

1. This Agreement is entered into between the Contracting Agency and the Contractor named below:

CONTRACTING AGENCY NAME

Department of Housing and Community Development

CONTRACTOR NAME

MB3 Inc, dba Civix

2. The term of this Agreement is:

START DATE

10/29/2019

THROUGH END DATE

10/28/2028

3. The maximum amount of this Agreement after this Amendment is:

\$31,606,874.00 (Thirty-One Million Six Hundred Six Thousand Eight Hundred Seventy Four Dollars and Zero Cents)

4. The parties mutually agree to this amendment as follows. All actions noted below are by this reference made a part of the Agreement and incorporated herein:

A. Amendment 7 will increase funds to continue services.

B. STD 213A, Item 3, the maximum amount of this Agreement, has been increased by \$7,293,894.00, changing the Agreement amount from \$24,312,980.00 to \$31,606,874.00.

C. Exhibit A, Authority, Purpose and Scope of Work, is hereby replaced in its entirety, as part of this amendment, attached hereto and made part hereof. Section 5 has been revised to remove amendment language.

D. Exhibit B, Budget Details and Payment Provisions, is hereby replaced in its entirety, as part of this amendment, attached hereto and made part hereof. Section 1 has been revised to add the additional funding to the total amount of the agreement and add the total amount of federal CDBG-DR and CDBG-MIT funding for the 2024 year. Section 2 has been revised to update the Key Personnel Table and add the year 2023 and 2024 CDBG-DR Grant Management Contract Key Personnel and Labor Classifications.

E. GenAI Information Section 21 from the General Terms and Conditions (GTC 02/2025) is included by reference and hereby made a part of this Agreement. <https://www.dgs.ca.gov/-/media/Divisions/PD/Acquisitions/Solicitation-Documents/NonIT-General-ProvisionsGoods-DGS-PD-401NITGP-Revised-02202025.pdf>

F. Attachment A, Resumes, is hereby amended to add additional resumes, as part of this amendment, attached hereto and made a part hereof.

*All other terms and conditions shall remain the same.***IN WITNESS WHEREOF, THIS AGREEMENT HAS BEEN EXECUTED BY THE PARTIES HERETO.****CONTRACTOR**

CONTRACTOR NAME (if other than an individual, state whether a corporation, partnership, etc.)

MB3 Inc, dba Civix

CONTRACTOR BUSINESS ADDRESS

3300 West Esplanade Ave. Ste 400

CITY

Metarie

STATE

LA

ZIP

70002

PRINTED NAME OF PERSON SIGNING

Angele C. Romig

TITLE

President

CONTRACTOR AUTHORIZED SIGNATURE

DATE SIGNED

July 2, 2026

STANDARD AGREEMENT - AMENDMENT

STD 213A (Rev. 4/2020)

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AGREEMENT NUMBER	AMENDMENT NUMBER	Purchasing Authority Number
19-CDBGDR-13032	7	2240

STATE OF CALIFORNIA

CONTRACTING AGENCY NAME

Department of Housing and Community Development

CONTRACTING AGENCY ADDRESS

651 Bannon Street, Suite 400

CITY

Sacramento

STATE

CA

ZIP

95811

PRINTED NAME OF PERSON SIGNING

Gina Villalobos

TITLE

Supervisor II, Contracts Services Section Chief

CONTRACTING AGENCY AUTHORIZED SIGNATURE



DATE SIGNED

7/2/2026

CALIFORNIA DEPARTMENT OF GENERAL SERVICES

(EMPTION (If Applicable))



EXHIBIT A

AUTHORITY, PURPOSE AND SCOPE OF WORK

1. MB3 Inc. dba Civix, hereafter referred to in this Agreement as the (“Contractor” or “MB3”), agrees to provide to the Department of Housing and Community Development, hereafter referred to in this Agreement as the (“HCD” or “Department” or “the State”) with grant management and program services related to Community Development Block Grant-Disaster Recovery (CDBG-DR) (“Work”) as described herein.
 - “Note: CDBG-DR is subject to Title I of the HCD Act, (42 U.S.C. § 5301 et seq.) which governs all federal Community Development Block Grant programs (CDBG.) CDBG-DR is also subject to the CDBG regulations at 24 CFR Part 570, unless modified by waivers and alternative requirements included in the applicable Federal Register Notice. CDBG-DR must also comply with the applicable requirements of 24 CFR Part 200, which provides the Federal government’s guidance on administrative requirements, cost principles, and audit requirements.”

HCD’s Mission is to promote safe, affordable homes and vibrant, inclusive, sustainable communities for all Californians. HCD values diversity at all levels of the organization and is committed to fostering an environment in which employees and partners from a variety of backgrounds, cultures, and personal experiences are welcomed and can thrive. We believe the diversity of our employees and our partners bring their unique ideas and perspectives that inspire innovative solutions to further our mission.

2. Work shall be provided at multiple locations, including but not limited to the following: 651 Bannon Street, Suite 700, Sacramento, California 95811, or remotely and onsite at various jurisdiction locations, during the hours of 8:00 am to 5:00 pm, Monday through Friday, excluding State observed holidays, as applicable.
3. The Representatives during the term of this Agreement will be:

Department of Housing and Community Development	MB3 Inc. dba Civix
Section/Unit: Division of Financial Assistance	Project Manager: Angele C. Romig
*Contract Manager: Alice Brodtkin	Title: President
Address: 651 Bannon Street, Suite 400 Sacramento, CA 95811	Address: 3300 West Esplanade Ave. Metairie, LA 70002
Bus. Phone No.: (916) 883-6139	Bus. Phone No.: (504) 304-2500
Email: Alice.Brodtkin@hcd.ca.gov	Email: aromig@gocivix.com

EXHIBIT A

**Both parties will have the right to change the Contract Manager/Representatives from time to time throughout the term of this Agreement. Such change will not require the consent of HCD or the Contractor. The changing party will notify the other party, in writing, of the name of the new Contract Manager/Representative within 30 days of his or her appointment to such position. Such written notice will not constitute, nor require, an amendment to this Agreement.*

4. Specifications and Detailed Description of Work

The Grant Management Services described herein apply as needed by HCD to all types of CDBG-DR eligible programs, including but not limited to housing, infrastructure, economic development, provision of public services, and resiliency as outlined below, and potentially the same services to accommodate other similar programs yet to be defined, including programs occurring as a result of past and future disasters or other federally funded initiatives. Not all programs will require each of the tasks and functions described herein. Contractor shall provide consulting and other necessary services that increases HCD's capacity and expertise to properly administer federal CDBG-DR program funds and provide grant management services to aid the State's recovery from wildfires, debris flows and mudslides.

The Contractor shall be responsible for completing the following activities:

A. Grant Administration, Policies and Procedures, Monitoring and Compliance

- 1) Support and assist HCD in the establishment of CDBG-DR programs, objectives, performance, compliance and monitoring standards and procedures for all CDBG-DR related activities, in accordance with CDBG-DR, HUD, and other applicable federal and local requirements rules and regulations.
- 2) Support and assist HCD in the establishment of programs and procedures for federally funded preparedness and mitigation measures, including development of best practices, for all CDBG-DR related activities, in accordance with CDBG-DR, HUD, and other applicable federal and local requirements rules and regulations.
- 3) Support and assist HCD in the development and monitoring of required policies and procedures for the CDBG-DR grant and all associated activities being carried out with the funding. Contractor shall also support and assist HCD in the development and establishment of quality control and quality assurance procedure, including key performance indicators.
- 4) Support and assist HCD in the establishment of policies and procedures related to the prohibition of duplication of benefits and in the auditing and monitoring of duplication of benefits.

EXHIBIT A

- 5) Support and assist HCD in all phases of the CDBG-DR grant management process, which includes, but is not limited to,
 - a) assessing compliance of the financial management systems and recommending changes, if needed;
 - b) ensuring responsible and accountable use of grant funds;
 - c) ensuring that CDBG-DR funds are not being comingled with non CDBG-DR funds;
 - d) ensuring transparent and authorized use of all CDBG-DR funds;
 - e) guarding against fraud waste, abuse, and ineligible use of funds;
 - f) ensuring that performance is in compliance with grant requirements;
 - g) ensuring that all key performance indicators are being properly monitored and addressed quickly and resolved effectively;
 - h) assisting with the management of the financial management systems;
 - i) assisting with the management of the project(s) period of performance schedule(s);
 - j) evaluating ongoing status reports, final reports and other deliverable products required under the CDBG-DR grant, and;
 - k) assisting in grant close-out procedures.
- 6) Support and assist HCD in the CDBG-DR grant oversight, management, supervision, and compliance monitoring process that involves an ongoing process of planning, implementation, performance, and communication follow-up. The objectives for the programmatic/contractual oversight, management, supervision, and compliance monitoring will be to:
 - a) determine and assure that municipalities, partners, subrecipients, subgrantees, contractors and managers are carrying out their projects, programs and/or scopes of work or services as described in their respective contracts or agreements;
 - b) determine and assure that municipalities, partners subrecipients, subgrantees, contractors and managers comply with CDBG-DR, HUD, and other applicable federal, state, and local requirements, rules and regulations;

EXHIBIT A

- c) determine and assure that municipalities, partners subrecipients, subgrantees, contractors and managers are carrying out their projects, programs and/or scopes of work or services on schedule or in a timely manner and within budget;
 - d) determine if municipalities, partners, subrecipients, subgrantees, contractors and managers are conducting their projects, programs and/or scopes of work or services with adequate control over program and financial performance and in a way that minimizes the opportunity for fraud, waste and abuse;
 - e) identify problem areas and assist municipalities, partners, subrecipients, subgrantees, contractors and managers in applicable requirements, and;
 - f) provide adequate follow-up measures in the form of quality improvement plans and corrective actions to ensure performance and compliance deficiencies are corrected and not repeated.
- 7) Support and assist HCD in overseeing and coordinating the grant administration, as well as daily activities and tasks.
 - 8) Support and assist HCD in the compliance with procurement regulations and policies and in overseeing procurement processes to ensure the award processes are fair and meet applicable rules and regulations.
 - 9) Support and assist HCD and program management contractors in the establishment of a claims, appeals and resolution procedures for all programs. Contractor shall review and provide guidance and recommendations on claims.
 - 10) Support and assist HCD in the development, monitoring and recommend modifications of the CDBG-DR grant master management and operations plan and schedule.
 - 11) Contractor shall prepare, monitor, enforce and oversee work schedules for the CDBG-DR activities, including, but not limited to, construction schedules for all programs approved in the CDBG-DR Action Plan and subsequent amendments.
 - 12) Contractor shall work with HCD staff to complete all monitoring and compliance related to all CDBG-DR activities.

EXHIBIT A

B. Staff Augmentation

- 1) Support and assist HCD with the establishment and implementation of staff augmentation strategies to ensure that the existing CDBG-DR fund allocation and the upcoming CDBG-DR fund allocations are adequately administered and implemented in accordance with CDBG-DR, HUD, and other applicable federal and local requirements, rules, and regulations.
- 2) Contractor shall possess the professional and technical staff necessary to perform and implement staff augmentation strategies and services and the staff shall have sufficient skills, qualifications, and experience to perform the services assigned to them. Contractor shall ensure that its staff performs all their corresponding and applicable responsibilities.
- 3) Contractor shall have available in its staff and/or make available through staff augmentation strategies the staff with the necessary subject matter expertise in CDBG-DR to adequately manage, oversee and assure adequate performance and compliance of the various eligible activities to be carried out in accordance with the Action Plan, such as, housing, infrastructure, construction, planning projects, economic development, environmental requirements, procurement and other CDBG-DR related activities. Contractor shall have understanding of all programs and/or projects and/or eligible activities included in the Action Plan in order to assist and provide its grant management services from the intake/application receipt process to the project/program conclusion/closeout.
- 4) Contractor shall provide an adequate number of qualified key personnel and staff located at the offices of HCD, as needed, to assist HCD in CDBG-DR related activities. This key personnel and staff should be able to or have access to staff who can communicate in oral and written Spanish language.
- 5) Contractor shall possess the professional and technical staff necessary to assist with information technology (IT) operational, system, website building and content management, and service support as needed. IT staff shall have sufficient skills, qualifications, and experience to perform the services assigned to them.

C. Document Compliance

- 1) Support and assist HCD in oversight and monitoring of the distribution of funds, including, documentation compliance. Contractor shall work with the HCD and program management contractors in order to determine documentation that must accompany requests for payment and assist in

EXHIBIT A

the review for completeness, compliance and accuracy of all pay request documents.

- 2) Contractor shall ensure timely submission of all required documentation, including, but not limited to, financial reports; performance reports by eligible activities carried out; budget and expenditures reports by eligible activities carried out; work progress, costs, and scheduling reports; resolution of findings, resolution of recommended changes, implementation of policies and resolution of issues affecting performance.
- 3) Contractor shall ensure timely submission and compliance with all required documentation, both for HCD and at the municipalities, partners, subrecipients, subgrantees, contractors and managers level, for proper submission, dissemination of information, as well as for proper record keeping. Contractor shall then provide, as needed, compliance oversight and technical assistance to HCD, municipalities, partners, subrecipients, subgrantees, contractors and managers, and review the documents for proper content and ensure information is complete, accurate and issued in a timely manner.
- 4) Support and assist HCD in the sufficient and appropriate document control and management initiatives and programs to meet financial management and all other documentation requirements for CDBG-DR grants. Contractor shall implement such document control initiatives and programs.
- 5) Contractor is required to maintain all documents, communications of any kind that relates in any manner to the CDBG-DR allocation for California for a minimum period of five (5) years following HUD grant closeout. Contractor shall provide protective storage and provide reports and electronic copies to the federal and local government, as required and/or requested. At HCD direction, the Contractor may need to share/upload/store all files and documents to an HCD designated location yet to be determined.
- 6) As requested by HCD, Contractor shall conduct desk reviews of the documentation supporting the program reports for accuracy and compliance and shall develop compliance checklists and other tools to assist with the compliance and oversight required by the CDBG-DR grant.
- 7) Support and assist HCD in review and revision of any CDBG-DR related contracts for CDBG-DR compliance and shall be available to explain contracts to all related stakeholders.

EXHIBIT A

D. Meetings, Reports, Data Management Software System and External Communications

- 1) If requested by HCD, Contractor shall represent HCD and/or participate with HCD in meetings, including but not limited to, with HUD, the Federal Government, municipalities, partners, subrecipients, subgrantees, beneficiaries, stakeholders, contractors, and managers.
- 2) Contractor shall monitor and report any identified or suspected instances of non-compliance with CDBG-DR, HUD, and other applicable federal, state, and local requirements, rules, and regulations, as well as any suspected fraud to HCD.
Contractor shall provide (i) a monthly status of each eligible activity being carried out, including monitoring of the budget, schedule, and performance against contract metrics, and (ii) assist HCD in official presentations and federal quarterly reporting requirements.
- 3) Contractor shall provide information on the following: (i) issues impacting each eligible activity being carried out, including reported problems, lagging performance, communication issues, etc., and the action being taken to resolve them; (ii) identification of risks associated with each eligible activity being carried out and the action being taken to mitigate, avoid or reduce them; (iii) deliverables completed to date and those scheduled for completion; (iv) resources available to deliver services, including staff and structure, technology and budget, identification of constraints affecting delivery and institution of corrective actions; (v) prepare high level presentations and briefs upon demand; (vi) carry out HCD and/or the State of California reporting obligations under the CDBG-DR grant.
- 4) Contractor shall have knowledge and expertise in HUD's Disaster Recovery Grant Reporting System (DRGR System) and its five (5) modules, i.e., (i) Admin Module – User management and monitoring; (ii) Action Plan Module – Funded project and activities; (iii) Drawdown Module – Access grant fund and program income; (iv) QPR Module – Report accomplishments; (v) Reports Module – Data analytics tool (MicroStrategy). Contractor shall assist HCD with programming and executing reporting requirements through the DRGR System and through any other federal reporting system required by the federal government.
- 5) HCD is establishing a web-based grants management system. HCD will make it available to the selected Contractor(s) and other authorized users via the Internet.
- 6) The selected Contractor(s) will be required to upload documents to the system for all Grantees with grant management service/task requests.

EXHIBIT A

- 7) HCD is not responsible for providing desktop hardware or software, peripheral equipment, or user Internet connectivity.
- 8) Contractor shall assist HCD with CDBG-DR reporting requirements for the State, including but not limited to the Annual Report for the legislature.
- 9) Contractor shall have expertise in disaster recovery data management and assist HCD in developing and implementing best practices for data management.
- 10) Contractor shall ensure that all CDBG-DR grant information including, but not limited to, financial information, is available at all times in one comprehensive, secure, and user-friendly electronic environment. Financial information includes, but is not limited to, budgeted amount for each eligible activity, CDBG-DR funds drawn to date, CDBG-DR funds expended to date and contract burn-rate reports for all contractors including the Contractor.
- 11) Contractor shall assist HCD and its procured public relations firm, if any, in content preparation for external communications, including, news releases, conferences and web content in relation to CDBG-DR and/or any of the other initiatives that may be pursuant to this contract.

E. Trainings and Supervision

- 1) Contractor shall conduct periodic trainings to local jurisdiction staff and/or to municipalities, partners, subrecipients, subgrantees, contractors and managers, as needed, to ensure compliance with funding regulations and requirements, including, CDBG-DR grant and local administrative practices, to meet performance objectives and ensure adherence to all applicable regulations and requirements. When major changes in policy or requirements occur, Contractor shall prepare the necessary training materials and effectively communicate the changes.
- 2) Support, assist and build HCD capacity in monitoring, supervising, and evaluating the CDBG-DR Program Manager(s) and staff and shall provide oversight, guidance, and technical expertise to CDBG-DR Program Manager(s).
- 3) Contractor shall ensure, monitor and oversee, through the qualified personnel or staff: (i) OSHA/CalOSHA compliance and supervision of job site safety; (ii) environmental assessments, when and where needed, are completed; (iii) fraud prevention and abuse practices are in place and being implemented; (iv) local and federal permit(s) clearance; (v) Wildland-Urban Interface (WUI) construction codes (CAL FIRE's Chapter

EXHIBIT A

7A) are being required and met in all CAL FIRE High Fire Zones where CDBG-DR funds are being used for construction ; (vi) environmental compliance; (vii) submission of all HUD required forms.

- 4) Contractor shall ensure and build HCD capacity to ensure municipalities, partners, subrecipients, subgrantees, contractors and managers comply with the requirements of the Secretary of Labor in accordance with the Davis-Bacon Act, Work Hours and Safety Standards Act, the Copeland "Anti-Kickback" Act, Fair Housing and Equal Opportunity Standards and all other applicable federal, and state laws and regulations pertaining to labor standards insofar as those acts apply to the performance of their respective contracts or agreements.
- 5) Contractor shall ensure and build HCD capacity to ensure that all municipalities, partners, subrecipients, subgrantees, contractors, managers, and any entities receiving CDBG-DR funds are aware of and are compliant with any regulatory requirements associated with the funds.
- 6) Support, assist and build HCD capacity in the evaluation of applications by municipalities, partners, subrecipients and/or subgrantees including, but not limited to, eligibility and prioritization and that applicant files are complete and maintained as part of the document control and management system. Contractor shall monitor and build HCD capacity to monitor municipalities, partners, subrecipients and/or subgrantees receiving CDBG-DR funds to meet the accounting, transparency, reporting, job creating, contracting and any other applicable requirements through proper oversight, outreach, and technical assistance.

F. Risk Management Assessments

Contractor shall provide risk management assessments in relation to the CDBG-DR grant.

G. Reviewing, Processing, Tracking and Monitoring of Invoices and Requests for Payments

Contractor shall review, process, track and monitor, and build HCD capacity to review, process, track and monitor all invoices and/or requests for payments for other contractors under CDBG-DR and forward the results of the reviews and processes to HCD and discuss, advise, and capacity build HCD as necessary.

H. Closeout and Other Grant Management Duties

- 1) Contractor shall assist in all project/program closeout tasks and submissions and ensure that all closeout documents are prepared and submitted as required. Contractor shall ensure that compliant procedures

EXHIBIT A

are followed with documents maintained and provided in order to satisfy HUD and other federal audit requirements, resulting in an audit financial report of all CDBG-DR related activities, including electronic copies of all supporting documents.

- 2) Contractor shall perform any other grant management duty or need, when requested, in order to assure compliance with CDBG-DR grant, HUD and/or any other applicable federal and local requirements, rules and regulations and/or HUD requests under the grant. Contractor shall also provide additional resources, as requested, to appropriately and timely respond to any other grant management duty or need.

I. State Implemented Activities

- 1) The tasks described herein shall also be available for programs or projects implemented directly by the State, on an as needed basis.
- 2) Programs which are entirely or in part implemented by the State, the Contractor may be requested, on an as needed basis as directed by HCD, to provide additional support activities in the implementation of programs, including but not limited to community planning, outreach, and associated services, conducting on-site and remote interviews of stakeholders, assisting with public participation requirements and assisting with property acquisition issues.

J. Reporting and Program Controls

- 1) Provide a functional organization structure with proper administrative oversight.
- 2) Submit monthly invoices including individual time sheets, if required, and evidence indicating the percent of work complete for each task order.

K. Other

- 1) The Contractor(s) may be required to perform language translation for documents and in public meetings, labor compliance reviews; review and approval of project plans, cost estimates, bidding documents and advertisements, and construction contracts and change orders on behalf of HCD; as well as production of cost reasonableness evaluations.
- 2) Additional work effort will be determined on a case-by-case basis and may include CDBG-DR compliance monitoring of any program funded with CDBG-DR.

EXHIBIT A

L. Service/Task Request and Budget Control System and Deliverables

- 1) Contractor shall support and advise HCD on the best method(s) for managing work, services, and budget. This may include development and implementation of a task order system or some such other system. Requests for services will describe the scope of work, deliverables, budget, and schedule.
- 2) Contractor shall provide full policies, procedures, forms and training for any work and budget management control system to be implemented.
- 3) The form that HCD implements to standardize Requests for Services, shall be used and the completion of each request form shall constitute a separate deliverable.

5. Effective Date and Term

- A. This Agreement is effective as of October 29, 2019. No services shall be provided before approval by DGS, or after the termination date. The termination date of this Agreement is October 28, 2028.

EXHIBIT B

BUDGET DETAIL AND PAYMENT PROVISIONS

1. **Agreement Amount**

The total amount of this Agreement shall not exceed \$31,606,874.00.

- The total amount of funding for 2017, 2018, 2020, 2021, 2023, and 2024 qualifying disasters shall not exceed \$31,606,874.00.

Any Action Plan work for additional years will be carried out under the current Scope of Work in this contract. The additional funding simply provides state resources to avoid using the limited federal administration funding HCD currently has. State funded Action Plan Work will be carried out under a separate task order and will be invoiced as such.

2. **Budget Detail**

2017, 2018, 2020, 2021, 2023, and 2024 CDBG-DR Grant Management Contract Key Personnel and Labor Classifications- June 2020

MB3 Team - Key Personnel		
Team Member	Labor Classification	Hourly Rate
Ted Guillot	Director	\$280.00
Adrienne Duncan	Project Manager	\$185.00
Emily Phalan	Project Manager	\$185.00
Patrick Robert	Project Manager	\$185.00
Angela Traill	Programmatic SME	\$215.00
Clint Whited	Programmatic SME	\$215.00
Whitney Roche	Programmatic SME	\$215.00
Rudy Munoz	Regulatory SME	\$235.00
Dionne Roberts	Regulatory SME	\$235.00
Jared Lee	Sr. Grant Manager	\$175.00

EXHIBIT B

Labor Category	Hourly Rate
Regulatory SME	\$235.00
Programmatic SME	\$215.00
Sr. Grant Manager	\$175.00
Grant Manager	\$145.00
Grant Analyst	\$125.00
Senior Technical Advisor	\$165.00
Associate	\$90.00
Financial Analyst	\$95.00
IT Specialist	\$85.00
Communications Specialist	\$150.00

Travel expenses are not provided. Any travel costs incurred are part of the total cost above.

- A. *Other Direct Costs are limited to translation services of vital documents in compliance with federal regulations and HCD's Citizen Participation Plan. Unless otherwise directed by HCD, vital documents will be translated into Spanish and interpreter services in American Sign Language and Spanish will be made available for public meetings, additional ODCs must be pre- approved by HCD.
- B. Supplies not individually listed within Other Direct Costs, or otherwise approved by the State, shall be provided by the Contractor at its own cost.

3. Invoicing and Payment

- A. Contractor shall invoice on a monthly or quarterly basis, with the total of all invoices not to exceed the amounts shown in Section 2, Budget Detail of this Exhibit.
- B. For services satisfactorily rendered, and upon receipt and approval of the invoices, and satisfactory supporting documentation. HCD agrees to compensate the Contractor the invoiced amount.
- C. Invoices must include this Agreement number and a Purchase Order number. Handwritten Agreement number is not acceptable.
- D. Invoices Submission for Contracts Managed Through Grants Network:
 - 1) The vendor must set up an account in the Grants Network system at www.gn.ecivis.com. The program link will be provided after contract execution.

EXHIBIT B

- 2) Invoices shall be submitted through the vendor's Grant Network account and will include all supporting documentation as an upload in the Financial Report (reimbursement request).
- 3) Supporting documentation must include:
 - a) Invoice summary which includes:
 - The performance period,
 - Contract number,
 - Purchase order number,
 - Names of worker's being included in the invoice broken out by task line item. Their total hours by task must be clear.
 - The total amount being invoiced.
 - b) Official timesheets for every person (vendor staff and subcontractors) included on the invoice. The timesheet must clearly show the worker's name and hours worked for each day.
 - c) A clear crosswalk of deliverables/accomplishments for which time is being billed, with a narrative explaining what work was being done during the time being billed. Generally, this is shown as a grid with column headings such as: Date, Task, Employee, Description of Services and Hours.
 - d) The timesheets and the crosswalk must match staff, tasks, hours, costs, and performance period being billed.
- 4) Budget Contingency Clause
 - A. It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the contract, this Agreement shall be of no further force and effect. In this event, HCD shall have no liability to pay any funds whatsoever to Contractor or to furnish any other considerations under this Agreement and Contractor shall not be obligated to perform any provisions of this Agreement.
 - B. If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this contract, HCD shall have the option to either cancel this Agreement with

EXHIBIT B

no liability occurring to HCD or offer an agreement amendment to Contractor to reflect the reduced amount.

5) Prompt Payment Clause

Payment will be made in accordance with, and within the time specified in Government Code Chapter 4.5, commencing with Section 927.

Emily Phalan, AICP

Project Manager



Emily Phalan is an experienced project manager and grant administrator with fifteen (15) years of expertise in federal and state grant program management and implementation, primarily focused on Housing and Urban Development (HUD) Community Development Block Grant (CDBG) and CDBG-Disaster Recovery (CDBG-DR) programs.

Emily has provided program management oversight and compliance for federally funded disaster recovery programs for the State of Texas. Her expertise derives from my ability to translate her years of project implementation experience along with her knowledge of policy resources and research methods to craft processes that ensure successful compliance from initiation to completion.



RELEVANT PRIOR EXPERIENCE

GrantWorks, Inc. Grant Manager and Subrecipient Team Lead

Responsibilities: Emily served as Grant Manager and Subrecipient Team Lead and was responsible for contract administration services supporting City of Houston and Harris County CDBG-DR programs as a vendor for the Texas General Land Office (GLO) Community Development & Revitalization Department. She also maintained the following responsibilities:

- Monitored federal policy and state contract compliance including tracking of financial benchmark progress, subrecipient reporting, and support with HUD DRGR reporting for CDBG-DR housing, public services, buyout, infrastructure, economic development, and planning programs
- Led a team of grant managers and coordinators, providing oversight for multifamily rental housing projects and single-family development projects
- Provided technical assistance and training to state agency staff, subrecipients, and team members
- Developed program standard operating procedures to ensure compliance with internal, state, and federal rules and regulations
- Reviewed and prepared correspondence, reports, and documents for state agency staff
- Tracked budgeting, program reporting, and payment request reimbursements in GLO TIGR system of record
- Directed oversight of the Houston and Harris County CDBG-DR planning programs including approval of project eligibility, draw submission reviews, and program closeout

GrantWorks, Inc.- Associate Vice President of Community Development

Responsibilities: Emily served as Associate Vice President of Community Development and was responsible for overseeing a team of 50+ project managers and support staff who administer the implementation of state and federal grants primarily funded with HUD CDBG and CDBG-DR allocations. She also maintained the following responsibilities:

- Oversaw staff assignments and performance projections of over 500 projects ranging in size from \$200,000 to \$52 million for local governments across the State of Texas
- Managerial efforts focused on ensuring that the quality of service provided to both internal and external stakeholders met the highest standards and guidance for training, process improvement, and project tracking for successful implementation
- Tracked Department progress invoicing and provided reports to executive staff
- Interpreted and provided guidance for federal, state, and local regulations and policies

QUALIFICATIONS

- 15 years of federal and state grant management experience
- HUD/CDBG-DR
- Program Management & Compliance
- Contract Administration

EDUCATION & TRAINING

- Master of Science, Community & Regional Planning, 2009, University of Texas at Austin
- B.A., Geography & the Environment, 2006, University of Texas at Austin

REGISTRATIONS/ CERTIFICATIONS

- American Institute of Certified Planners (AICP), 2013
- HUD OIG CDBG-DR Fraud, Waste, and Abuse Training, 2020

- Communicated with state agency staff and stakeholders for project facilitation and to resolve issues

GrantWorks, Inc. – Director of Community Development

Responsibilities: Emily served as Director of Community Development and was responsible for overseeing a team of 20+ project managers and support staff who administered the implementation of state and federal infrastructure grants primarily funded with HUD CDBG and CDBG-DR allocations. She also maintained the following responsibilities:

- Oversaw staff assignments and projections of over 300 projects ranging in size from \$200,000 to \$20 Million
- Led weekly Department meetings discussing program procedures and technical assistance topics
- Tracked Department progress invoicing to ensure performance milestones and deadlines were met
- Developed processes for growing project manager team and training for new staff

GrantWorks, Inc. - Assistant Director of Community Development

Responsibilities: Emily served as Assistant Director of Community Development and was responsible for supporting the Director in department oversight of administration and implementation of state and federal grants primarily funded with HUD CDBG and CDBG- DR allocations. She also maintained the following responsibilities:

- Developed departmental processes to improve project management and implementation
- Trained new staff and met weekly with project managers providing technical support and guidance
- Monitored grant-funded processes, thereby ensuring compliance with State and Federal requirements
- Continued to serve as project manager on several complex grant projects

GrantWorks, Inc.- Senior Project Manager

Responsibilities: Emily served as Senior Project Manager and was responsible for coordination, administration, and compliance of the over 50 complex state and federally funded grants at various phases. She also maintained the following responsibilities:

- Ensured projects met compliance standards from the HUD CDBG and various state programs
- Served as mentor to fellow project managers and providing training for new hires
- Coordinated with public agencies to submit project deliverables, reports, oversee budgets and monitoring invoicing and reimbursement

GrantWorks, Inc. - Project Manager

Responsibilities: Emily served as Project Manager and was responsible for coordination, administration, and compliance of the over 20 state and federally funded grants at various phases. Projects included infrastructure projects funded with HUD CDBG and CDBG-DR allocations, as well as TxDOT Transportation Enhancement and Texas Parks and Wildlife grants. She also maintained the following responsibilities:

- Ensured projects met compliance standards from the HUD CDBG and various state programs including monitoring procurement and contracting, community engagement, environmental review, permitting, construction procurement, review of contractor pay estimates and engineering invoices, contract amendments, fair housing requirements, labor standards, and project completion reports
- Monitored project finance and compliance with local and federal regulations including tracking and meeting performance milestones and deadlines
- Communicated with and served as designated project liaisons to State, City, and County stakeholders including presentations for City Council and Commissioners' Court meetings

EMPLOYMENT HISTORY

Civix – Senior Grant Manager
July 2025 – Present

GrantWorks, Inc. – Grant Manager
and Subrecipient Team Lead
August 2021 – July 2025

GrantWorks, Inc. – Associate Vice
President of Community Development
July 2020 – July 2021

GrantWorks, Inc. – Director of
Community Development
November 2018 – July 2020

GrantWorks, Inc. – Assistant Director
of Community Development
January 2018 – November 2018

GrantWorks, Inc. – Senior Project
Manager
September 2014 – January 2018

GrantWorks, Inc. – Project Manager
March 2010 – September 2014

Patrick Roberts

Project Manager



SUMMARY

At Civix Consulting Group (CCG), Patrick Roberts is a solution driven project manager who possesses over 25 years of proven leadership and management experience. Patrick is an expert in disaster recovery strategy, planning, implementation, compliance, monitoring and closeout reporting. He is experienced in leading organizational teams, while simultaneously responding to rapidly changing conditions on multiple programs. He has demonstrated strength in process design and improvement by utilizing and integrating newly created processes with existing framework.

QUALIFICATIONS

- Over 25 years of project management and consulting experience
- Emergency Management Response & Recovery program management
- Adept in all areas of project management from initiation through closeout
- Section 3 and Labor Compliance monitoring
- Project Planning
- Change Management
- Strategic Planning

EDUCATION & TRAINING

- Bachelor of Arts in Public Administration, 1987, University of Northern Iowa

RELEVANT PROJECT EXPERIENCE

Lee County CDBG-DR Grant Management Services

Client: Lee County, Florida

Description: CCG is providing Grant Compliance and Monitoring support to perform quality assurance, monitoring and reporting duties and provide technical assistance for grant compliance to the County staff and subrecipients. CCG is providing subject matter expertise in developing best practices for conducting risk assessments for all subrecipients, developing monitoring plans. CCG will also provide support in conducting monitoring of contractor implementation to ensure compliance with federal regulations and County policies and procedures, developing monitoring checklists and integrated the process into the County's system of record for tracking and follow up needs.

CCG is also providing support the County for fiscal related processes to maintain and manage the County's DRGR system in accordance with the County's Action Plan.

Project Role: Patrick serves as Project Manager on this assignment.

Project Dates: September 2023 – Present

Reference: Benjamin Small

Baldwin County CDBG-DR Recovery Plan

Client: Baldwin County Commission

Description: CCG engaged with the Baldwin County Commission to provide Community Development Block Grant Disaster Recovery (CDBG-DR) subject matter expertise, and policy advisory services to

assist with program decisions and development of a Local Recovery Plan (LRP) to address recovery needs from Hurricanes Sally and Zeta that impacted the area in 2020. The scope of work included the development of a Local Recovery Plan, detailing the County's unmet recovery needs and proposed CDBG-DR programs to address housing, economic development, infrastructure and mitigation activities. CCG led the planning efforts for the County which included data collection and analysis, stakeholder engagement, planning and coordination of public meetings and communications, and delivery of the LRP. CCG also provided technical assistance to the County on grant administration, cross-cutting requirements and compliance, and program engagement and design for the proposed LRP programs.

Project Role: Patrick served as Senior Grant Manager for this assignment.

Project Dates: March 2024 – May 2025

Reference: Brian Underwood, Director, Grants Department, Baldwin County, 322 Courthouse Square, Bay Minette, AL 36507; (251) 937-0281; Brian.Underwood@baldwincountyal.gov

California Labor Compliance Technical Assistance

Client: State of California Department of Housing and Community Development, Division of Federal Financial Assistance

Description: The State of California Department of Housing and Community Development (HCD) engaged CCG to provide labor standards compliance services for the federally funded programs it administers (CDBG-DR/MIT, CDBG, CDBG-CV, HOME, HOME-ARP, NHTF, and ESG programs). The scope of these labor standards compliance services includes compliance support, technical assistance, capacity building efforts and subrecipient monitoring. To meet the needs of HCD's scope, CCG employed a team of subject matter experts (SMEs), technical assistance (TA) providers, and monitoring personnel who operate in the areas of federal and state prevailing wage determinations, state labor code and federal Davis-Bacon and Related Acts (DBRA), Section 3, minority- and women-business enterprise (MBE/WBE), and Affirmatively Furthering Fair Housing (AFFH) requirements, to offer cross-cutting regulatory compliance, subrecipient monitoring and oversight, and federal reporting guidance.

Project Role: Patrick served as Senior Grant Manager for this assignment.

Project Dates: November 2023 – April 2025

Reference: Jessica Hayes, Federal Services, Compliance, and Operations Branch Chief; California Department of Housing and Community Development, May Lee State Office Complex – Southwest Tower 651 Bannon Street, Suite 800, Sacramento, CA 95811
Phone: 916.620.3760; jessica.hayes@hcd.ca.gov

State of California CDBG National Disaster Resilience Implementation

Client: State of California Department of Housing and Community Development

Description: CCG serves as the primary outside advisor to the State of California for the implementation of its \$70 million CDBG-NDR award to develop and implement its Community and Watershed Resilience Program. The program consists of three pillars: forest and watershed health, the biomass utilization loan and grant fund, and community resilience centers. CCG supported the State

EMPLOYMENT HISTORY

Civix Consulting Group – Senior Grant Manager

2020 – Present

Prosource Technologies, Senior Project/Contract Manager

2010 – 2020

Iowa Department of Economic Development, Housing Buyout Project Manager

2009 – 2010

during phase two of the National Disaster Resilience Competition and has transferred that knowledge into the implementation phase of the initiative. CCG's scope of work includes support across a number of areas, including technical assistance to the State and its subrecipients, project design, project implementation support, compliance monitoring, and overall program management support.

Project Role: Patrick serves as Senior Grant Manager for this assignment.

Project Dates: June 2019 – Present

Reference: Jessica Hayes, Federal Services, Compliance, and Operations Branch Chief; California Department of Housing and Community Development, May Lee State Office Complex – Southwest Tower 651 Bannon Street, Suite 800, Sacramento, CA 95811
Phone: 916.620.3760; jessica.hayes@hcd.ca.gov

State of California Grant Management Services

Client: State of California Department of Housing and Community Development

Description: The State of California Department of Housing and Community Development (HCD) received approximately \$2 billion in CDBG-DR and CDBG-MIT funding as a result of disasters occurring in 2017, 2018, 2020, 2021, 2023, and 2024. CCG, along with a team of subcontractors, provide grant management services across the full spectrum of administrative and programmatic aspects of the grant, including project management and oversight, grant administration, and program design and management. Specific efforts include stand up and implementation of HCD's single family housing, multi-family housing, workforce development, and infrastructure recovery programs, developing the launch and supporting the implementation of HCD's CDBG-MIT programs, establishing financial controls, developing and implementing a compliance monitoring plan, and training and capacity building for HCD staff and its subrecipients. CCG's team of CDBG-DR subject matter experts work side-by-side with HCD personnel to establish and implement administrative and programmatic policies and procedures, efficiently develop programs so they can be launched, and engage with subrecipients to ensure they are prepared to administer CDBG-DR funding and complete grant-funded projects in a timely and compliant manner.

Project Role: Patrick's role includes management and oversight of the grant administration functional areas and supporting the design and implementation of a portfolio of homeowner assistance programs.

Project Dates: October 2019 – Present

Reference: Alice Brodtkin, Disaster Recovery Federal Fiscal Compliance Section Manager, California Department of Housing and Community Development, 2020 West El Camino Avenue, Sacramento, CA 95833; (916)-883-6139; alice.brodtkin@hcd.ca.gov

Angie Traill

Programmatic SME



SUMMARY

Angie Traill serves as a subject matter expert on federal regulatory compliance with Civix Consulting Group (CCG). Her areas of focus include financial management, labor and wage regulations, compliance monitoring, and developing administrative policies and procedures. Her recent work includes providing technical assistance and support on disaster recovery and entitlement programs for the states of Nebraska, California, Louisiana, and Arkansas, and localities including Mobile, Alabama, Norfolk, Virginia, and Jefferson Parish, Louisiana. Prior to joining CCG, she served as a Grants Project Manager for St. Tammany Parish, Louisiana where she led the administrative and oversight of its annual HUD allocations. She played a significant role in the development and submission of the Annual Action Plan, Consolidated Plan and Assessment of Fair Housing, and has led monitoring of multiple HUD funded grant programs. She has also held positions in government and nonprofits where she developed policy and led campaigns on family self-sufficiency, workforce development, and veterans' issues.

QUALIFICATIONS

- 17 years of experience working with federal grants and policy
- Experience with the design and oversight of federally funded programs
- Expert in federal compliance and monitoring
- Section 3
- Davis-Bacon and Related Acts

EDUCATION & TRAINING

- Master of Public Administration, 2011, George Washington University
- Bachelor of Arts, Communication Studies, 2005, Seattle University

RELEVANT PROJECT EXPERIENCE

State of California Grant Management Services

Client: State of California Department of Housing and Community Development's Disaster Recovery Section (HCD)

Description: The State of California Department of Housing and Community Development (HCD) received approximately

\$2 billion in CDBG-DR and CDBG-MIT funding as a result of disasters occurring in 2017, 2018, 2020, 2021, 2023, and 2024. CCG, along with a team of subcontractors, provided grant management services across the full spectrum of administrative and programmatic aspects of the grant, including project management and oversight, grant administration, and program design and management. Specific efforts included stand up and implementation of HCD's single family housing, multi-family housing, workforce development, and infrastructure recovery programs, developing the launch and supporting the implementation of HCD's CDBG-MIT programs, establishing financial controls, developing and implementing a compliance monitoring plan, and training and capacity building for HCD staff and its subrecipients. CCG's team of CDBG-DR subject matter experts worked side-by-side with HCD personnel to establish and implement administrative and programmatic policies and procedures, efficiently develop programs so they could be launched, and engaged with subrecipients to ensure they were prepared to administer CDBG-DR funding and complete grant-funded projects in a timely and compliant manner.

EMPLOYMENT HISTORY

Civix Consulting Group –

Deputy Director
July 2025 - Present

Civix Consulting Group –

Senior Grant Manager
July 2018 – July 2025

St. Tammany Parish
Government

June 2016 – June 2018

U.S. Department of Veterans
Affairs September 2010 – June
2013

Wider Opportunities for
Women

October 2009 – May 2010

Project Role: Angie served as a Senior Grant Manager for the project. Her role included supporting and providing guidance on fiscal and monitoring regulatory compliance, program design, and grant administration support.

Project Dates: October 2019 – present

Reference: Alice Brodtkin, Disaster Recovery Federal Fiscal Compliance Section Manager, California Department of Housing and Community Development, May Lee State Office Complex – Southwest Tower 651 Bannon Street, Suite 800, Sacramento, CA 95811 (916)-883-6139; alice.brodtkin@hcd.ca.gov

Baldwin County CDBG-DR Grant Implementation

Client: Baldwin County Commission

Description: CCG engaged with the Baldwin County Commission to provide technical assistance and subject matter expertise for the

Community Development Block Grant Disaster Recovery (CDBG-DR) subaward from the State of Alabama. CCG will support the County in implementing its Local Recovery Plan (LRP) to address recovery needs from Hurricanes Sally and Zeta that impacted the area in 2020. The scope of work includes the implementation and oversight of CDBG-DR programs that provide homeownership assistance and address infrastructure and mitigation activities, including eligibility determination and documentation review, milestone tracking, data collection and reporting, labor and cross-cutting regulatory compliance, stakeholder coordination, community engagement and outreach, technical assistance, and monitoring.

Project Role: Angie serves as the Project Manager for this project.

Project Dates: November 2025 – Present

Reference: Katrina Taylor, Grants Administrator, Baldwin County Commission, 322 Courthouse Square, Bay Minette, AL 36507; (251) 972-6820; Katrina.taylor@baldwincountyal.gov

Baldwin County CDBG-DR Recovery Plan

Client: Baldwin County Commission

Description: CCG engaged with the Baldwin County Commission to provide Community Development Block Grant Disaster Recovery (CDBG-DR) subject matter expertise, and policy advisory services to assist with program decisions and development of a Local Recovery Plan (LRP) to address recovery needs from Hurricanes Sally and Zeta that impacted the area in 2020. The scope of work includes the development of a Local Recovery Plan, detailing the County's unmet recovery needs and proposed CDBG-DR programs to address housing, economic development, infrastructure and mitigation activities. CCG led the planning efforts for the County which included data collection and analysis, stakeholder engagement, planning and coordination of public meetings and communications, and delivery of the LRP. CCG has also provided technical assistance to the County on grant administration, cross-cutting requirements and compliance, and program engagement and design for the proposed LRP programs.

Project Role: Angie served as the Project Manager for this project.

Project Dates: April 2024 – May 2025

Reference: Katrina Taylor, Grants Administrator, Baldwin County Commission, 322 Courthouse Square, Bay Minette, AL 36507; (251) 972-6820; Katrina.taylor@baldwincountyal.gov

City of Mobile CDBG-DR Grant Management Services

Client: City of Mobile, Alabama

Description: CCG is engaged with the City of Mobile Neighborhood Development Department to provide technical assistance and subject matter expertise for the City's Community Development Block Grant Disaster Recovery (CDBG-DR) subaward for recovery from Hurricanes Sally and Zeta that impacted the region in 2020. This engagement is the implementation of the Local Recovery Plan that identified the City's unmet recovery needs and defined CDBG-DR funding for multifamily housing development and infrastructure. Project oversight for CDBG-DR implementation includes eligibility determination and documentation set up, project milestone tracking, data collection and reporting, labor and cross-cutting regulatory compliance, stakeholder coordination, and technical assistance and monitoring.

Project Role: Angie serves as the Project Manager for this project.

Project Dates: August 2025 – Present

Reference: James Roberts, Senior Director; City of Mobile, 205 Government Street, Mobile, AL 26602; (251) 208-6291; james.roberts@cityofmobile.org

City of Mobile CDBG-DR Planning Services

Client: City of Mobile, Alabama

Description: CCG engaged with the City of Mobile Neighborhood Development Department to provide Community Development Block Grant Disaster Recovery (CDBG-DR) Planning Services in response to Hurricanes Sally and Zeta. The scope of work included the development of a Local Recovery Plan that identifies the City's unmet recovery needs and proposed CDBG-DR programs to address unmet housing, economic development, infrastructure and mitigation needs. In addition to the development of the CDBG-DR Local Recovery Plan, CCG provided planning services including the update of the City's Housing Plan, and the development of a real estate developer booklet and an assessment of architectural services to aid in the City's recovery.

Project Role: Angie served as a Senior Grant Manager for this project.

Project Dates: February 2024 – July 2025

Reference: James Roberts, Senior Director; City of Mobile, 205 Government St, Mobile, AL 26602; (251) 208-6291; james.roberts@cityofmobile.org

HUD Technical Assistance

Client: U.S. Department of Housing and Urban Development

Description: CCG is providing technical assistance and subject matter expertise to the County of St. Louis, MO as a first-time recipient of CDBG-DR funds. Impacted by a severe storm and flooding event in 2022, CCG has supported the County of St. Louis' Department of Human Services navigate the difference between entitlement CDBG and the added requirements and flexibilities of its \$56.4M disaster recovery funds. : As a Technical Assistance provider to the Department of Housing and Urban Development, CCG has supported the implementation of Community Development Block Grant Disaster Recovery dollars states and local governments on behalf of HUD for the past eight years. Grantees include Commonwealth of Puerto Rico; Nebraska; New York; Washington; Oklahoma; Arkansas; Missouri; St. Louis County, MO; City of St. Louis, MO; Houston, TX; San Marcos, TX; Philadelphia, PA; Cicero, IL. These engagements include a range of services to support the development of statewide disaster recovery documents, including data collection and analysis, geographic information system, stakeholder outreach, and compliance with HUD program guidelines. Each

engagement includes program design for HUD funded housing, infrastructure, and mitigation programs. Technical assistance activities have included development and review of the Action Plan, guidance on program partnerships, regulatory training, and development of policies and procedures. CCG will provide staff training and guidance as these states continue to design and launch CDBG-DR programs, support assessments of capacity and program needs, and provide tools to identify and improve subrecipient capacity to implement awarded projects in impacted communities.

Project Role: Angie serves as a Senior Grant Manager for this assignment.

Project Dates: October 2023 – Present

Reference: Olivia Healey , Community Planning and Development Specialist, U.S. Department of Housing & Urban Development; 820 First Street NE Suite 300 Washington, CD 20002, olivia.p.healey@hud.gov

City of Norfolk CDBG Technical Assistance

Client: Department of Housing and Community Development

Description: CCG is engaged with the Department of Housing and Community Development to provide on-call technical assistance, trainings, and program management support across its portfolio of HUD CPD grants (CDBG, HOME, ESG) to build capacity and ensure compliance. CCG has supported Renovate Norfolk, the City's owner-occupied housing rehabilitation program, by developing the policies and procedures, application priorities, and building tools for effective program implementation. CCG prepared the 2022 Analysis of Impediments to Fair Housing Choice report (AI) to help identify Norfolk's housing challenges, and opportunities for community and economic development. CCG has also provided support and guidance in monitoring preparations and responses, updating grant administration policies, and developing greater collaboration with partner agencies.

Project Role: Angie serves as the Project Manager for the project and provides oversight on technical assistance needs, policy content and deliverable development, coordination on planning and analysis for the AI, and guidance on program implementation and regulatory and compliance requirements.

Project Dates: October 2021 – September 2024

Reference: Derek Kahn, Assistant Director, Community Development, City of Norfolk, 501-A Boush Street, Norfolk, VA 23510; (757)-664-2495; derek.kahn@norfolk.gov

City of Kenner On-Call Technical Assistance

Client: City of Kenner, Louisiana Department of Community Development

Description: CCG has provided on-call technical assistance to the City's Department of Community Development beginning in the Spring of 2020 in response to COVID-19 pandemic and again in the Fall of 2022 in response to Hurricane Ida. Technical assistance includes the State of Louisiana Community Development Block Grant-Disaster Recovery (CDBG-DR), Section 108 loan guidance, HOME Investment Partnership (HOME) and HOME-American Rescue Plan (HOME-ARP) programs. CCG's scope of work includes regulatory support, program management, and guidance on the layering of CDBG-DR funding and other HUD funding sources including CDBG, CDBG-Coronavirus (CDBG-CV), HOME, and HOME-ARP.

Project Role: Angie serves as a Senior Grant Manager for the project.

Project Dates: March 2020 – December 2021; October 2022 – Present

Reference: Tamithia Shaw, Director, Department of Community Development; 624 Williams Boulevard, Kenner, LA 70062; (504) 468-7588; tshaw@kenner.la.us

Whitney Roche

Programmatic SME



SUMMARY

At Civix Consulting Group (CCG), Whitney Roche has approximately 16 years of Disaster Recovery and CDBG experience on a variety of Housing, Infrastructure, and Economic Development programs. The bulk of his experience comes from working with the State of Louisiana in response to Hurricane's Katrina and Rita. Whitney provided internal audit, anti-fraud, waste, and abuse services for the Louisiana Road Home Program, the Small Rental Property Program, Louisiana Land Trust, and the Homeowner Assistance Program. He also served as the Investigative Lead for the Louisiana Road Home Program and Compliance Director for the Homeowner Assistance Program, where he helped develop the program's approach to receiving and reviewing fraud allegations. Whitney has overseen investigations and program analytics, provided guidance and training to employees on ethical practices, conducted audits of subcontractors, and drafted program responses to HUD inquiries.

RELEVANT PROJECT EXPERIENCE

State of California Grant Management Services

Client: State of California Department of Housing and Community Development

Description: The State of California Department of Housing and Community Development (HCD) received approximately \$2 billion in CDBG-DR and CDBG-MIT funding as a result of disasters occurring in 2017, 2018, 2020, 2021, 2023, and 2024. CCG, along with a team of subcontractors, provide grant management services across the full spectrum of administrative and programmatic aspects of the grant, including project management and oversight, grant administration, and program design and management. Specific efforts include stand up and implementation of HCD's single family housing, multi-family housing, workforce development, and infrastructure recovery programs, developing the launch and supporting the implementation of HCD's CDBG-MIT programs, establishing financial controls, developing and implementing a compliance monitoring plan, and training and capacity building for HCD staff and its subrecipients. CCG's team of CDBG-DR subject matter experts work side-by-side with HCD personnel to establish

QUALIFICATIONS

- 16 years of experience with Disaster Recovery and CDBG experience on a variety of Housing, Infrastructure, and Economic Development programs.
- Lead design, daily operations, and compliance efforts for a variety of programs.
- Designed and conducted trainings for State employees regarding ethical practices and conduct.
- Experience analyzing the operational and financial processes to detect and prevent misconduct and fraudulent financial reporting while mitigating potential risks.

EDUCATION & TRAINING

- Master of Business Administration, 2002, Louisiana State University, Baton Rouge, Louisiana
- Bachelor of Science, Marketing, 1999, Louisiana State University, Baton Rouge, Louisiana

and implement administrative and programmatic policies and procedures, efficiently develop programs so they can be launched, and engage with subrecipients to ensure they are prepared to administer CDBG-DR funding and complete grant-funded projects in a timely and compliant manner.

Project Role: Whitney is the Housing Programmatic SME. Whitney's role includes supporting the state's team design ing and implementing homeowner recovery programs.

Project Dates: October 2019 – October 2025

Reference: Alice Brodtkin, Disaster Recovery Federal Fiscal Compliance Section Manager, California Department of Housing and Community Development, May Lee State Office Complex – Southwest Tower 651 Bannon Street, Suite 800, Sacramento, CA 95811 (916)-883-6139; alice.brodtkin@hcd.ca.gov

Asset Management

Client: Louisiana Housing Corporation

Description: In partnership with Franklin Associates, CCG supports the Louisiana Housing Corporation (LHC) in the rehabilitation and/or development of affordable mixed-income multifamily rental housing on eligible sites in designated disaster impacted areas. CCG provides functional support for LHC's CDBG-DR funded Multifamily programs (Piggyback, PRIME 1, PRIME 2, PRIME 3). CCG assists in the observation of current asset management processes, proposes refinements, and creates reporting while facilitating asset management reviews for outstanding LHC projects. CCG assists with the preparation of documents needed to facilitate developer and program stakeholder discussions related to funding and program requirements

Project Role: Whitney serves as the Grants Administration Manager for this project.

Project Dates: April 2025 – Present

Reference: Emily Harris-Shears, Senior Project Manager, Franklin Associates, 250 S. Foster Drive, Baton Rouge, LA 70806, 225-377-4556, emily@franklinassociates.com

State of Louisiana Emergency Rental Assistance Program

Client: State of Louisiana Office of Community Development

Description: In December 2020, the State of Louisiana received \$161 million in emergency rental and utility assistance funding to address critical needs arising from the impacts of COVID-19. As part of the team providing overall program management services to the state, CCG supported program development, the development of policies and procedures, outreach and communications, and data analytics.

Project Role: Whitney was the Project Manager, providing policy and process operational support while also assisting with the implementation of the program's outreach strategy.

Project Dates: November 2020 – January 2023

Reference: Gina Campo, Deputy Executive Director, State of Louisiana Office of Community Development, 1201 N. Third St. Suite 7-210, Baton Rouge, LA 70802, (225) 219-9600, gina.campo@la.gov

St Tammany Parish Rental Assistance Program

EMPLOYMENT HISTORY

Civix Consulting Group – Director and Programmatic SME

2019 – Present

Innovative Emergency Management, Project Manager

2018 – 2019

HGI, Director of Program Compliance

2014 – 2018

HGI, Investigative Lead

2009 – 2014

KPMG, Forensics Manager

2005 – 2009

Entergy Corporation, Lead Risk Analyst

2002 – 2005

Client: St. Tammany Parish

Description: CCG assisted St. Tammany Parish with the development, implementation, and oversight of the emergency rental assistance program. The scope of work included developing, writing, and training personnel on program policies. CCG developed SOP's and trained program personnel on program processes. CCG assisted the Parish staff in coordinating with State and Federal agencies on developing a system of record for both data sharing, and data management for the program. CCG reviewed operational targets and throughput and adjust policies and processes to maximize efficiencies. CCG provided quality control/quality assurance of eligibility process by conducting final file reviews prior to award approval. CCG provided ongoing interpretation and application development of federal regulations related to emergency rental assistance. In addition, CCG assisted with state and federal reporting requirements.

Project Role: Whitney served as the Grants Administration Manager. Whitney's role included supporting the implementation of the outreach strategy, coordinating outreach activities across functional areas, and supporting policy development.

Project Dates: March 2021 – September 2025

Reference: Jeanne Marino Harris, Director of Grants, St. Tammany Parish Government; 21490 Koop Drive, Mandeville, LA 70471; Phone: (985) 867-5095; Email: jmmarino@stpgov.org

Texas GLO Housing Program Implementation

Client: State of Texas General Land Office (GLO)

Description: CCG supported the Texas General Land Office in the implementation of its Homeowner Assistance Program, which provides assistance to homeowners whose properties were damaged as a result of Hurricane Harvey. CCG provided housing program services on application intake, outreach and engagement, policies and procedures development, and quality assurance/quality control efforts. The team provided data analysis and GIS support to develop a needs assessment to guide program design and outreach efforts, supported the receipt and review of over 4,000 applications across two regions, developed policies and procedures, developed and implemented a Section 3 Plan, and trained new personnel on the program's rules and requirements.

Project Role: Whitney served as the Grants Administration Manager. His role included supporting the operations team, as needed.

Project Dates: September 2018 – June 2024

Reference: Joanna Redmond, Disaster Recovery Department Manager – Central Region; AECOM; 7389 Florida Boulevard, Suite 300, Baton Rouge, LA 70806; (225) 922-5700; joanna.redmond@aecom.com

Texas GLO Imelda Housing Recovery Program

Client: Texas General Land Office

Description: CCG provided oversight for team of case managers responsible for meeting with program applicants, explaining program requirements, and obtaining required documentation to determine program eligibility.

Project Role: Whitney served as the Grants Administration Manager. His role included supporting the operations team, as needed.

Project Dates: March 2021 – June 2024

Reference: Joanna Redmond, AECOM, Project Manager – Disaster Recovery; 7389 Florida Blvd, Suite 300, Baton Rouge, LA; Phone: (225) 922-5700; Email: joanna.redmond@aecom.com

CDBG-DR Oversight and Monitoring

Client: State of Florida - Department of Commerce, Office of Long-Term Resiliency

Description: CCG provided quality assurance/quality control and programmatic and fiscal monitoring services to the State of Florida - Department of Commerce (FloridaCommerce), Office of Long-Term Resiliency (OLTR) on the implementation of two of its CDBG-DR allocations, a \$117 million program for Hurricanes Hermine and Matthew recovery and a \$812 million program for Hurricane Irma recovery. Additionally, CCG was tasked with delivering pre-monitoring technical assistance on a number of OLTR's Irma programs, which primarily consist of its Housing Repair and Replacement Program, Infrastructure Repair Program, Voluntary Home Buyout Program, and Workforce Recovery Training Program.

Project Role: Whitney served as the Grants Administration Manager for this assignment.

Project Dates: October 2019 – December 2025

Reference: Leah Langston, Policy Manager, State of Florida - Department of Commerce, Office of Long-Term Resiliency, 107 East Madison Street, Tallahassee, FL 32399-4120; (850) 717-8422; leah.langston@commerce.fl.gov

North Carolina Office of Recovery and Resiliency HOPE Program Staff Augmentation

Client: State of North Carolina

Description: As a subcontractor to Hunt, Guillot & Associates, CCG, was responsive to the call from NCORR for support on its Housing Opportunities and Prevention of Evictions (HOPE) Program, which provides critical funding to low-to-moderate income households in the forms of emergency rental and utility assistance to prevent homelessness and improve housing stability amidst the COVID-19 pandemic. Building on CCG's work with NCORR on its CDBG-DR and CDBG-MIT funding, our team has shifted to the HOPE Program to provide support in the areas of case management, file reviews, stakeholder outreach, and data management and reporting.

Project Role: Whitney served as the Project Manager for this assignment.

Project Dates: November 2020 – September 2022

St. Tammy Parish LWI Buyout Program

Client: St. Tammany Parish, Department of Grants

Description: CCG served as a subcontractor to Team Title in advising St. Tammany Parish on the management of its \$10 million CDBG-MIT award to implement a buyout program designed to reduce repetitive loss in targeted areas. CCG's scope included addressing the administrative, technical, engagement, outreach, policy, planning, and related support services needed to help develop, facilitate, and implement the program. Additionally, CCG conducted all case management activities for the program.

Project Role: Whitney was the Project Director for this assignment providing guidance and oversight across all project operations.

Project Dates: October 2022 – December 2025

Reference: Jeanne Marino Harris, Director of Grants - St. Tammany Parish, Koop Drive Administrative Complex Building B, 21454 Koop Drive, Mandeville, LA 70471, (985) 867-5095 jmmarino@stpgov.org