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RFP NO. 455 | CONFIDENTIAL
MATTER

April 24, 2025

A Proposal for the City of Fort Lauderdale

COMMUNITY DEVELOPMENT BLOCK GRANT DISASTER RECOVERY

POC:

Maria Badaracco

Contract

Contracts@iem.com • (919) 990-8191

Administrator

ATTN:

Yesenia Pascual, Sr. Procurement Specialist

ypascual@fortlauderdale.gov • (954) 828-5257



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CAM #25-0677

Exhibit 3

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Confidential Matter

The table below identifies the confidential matter of our proposal.

Proposal Section	Proposal Page Number	Florida Statute
Section 3.0	Page 22	Florida Statute 119.0715(2) PUBLIC RECORD EXEMPTION
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Section 5.0	Pages 60-63	Florida Statute 119.0715(2) PUBLIC RECORD EXEMPTION
Section 7.0	Pages 74-76	Florida Statute 119.071(1)(c)
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2.0 Executive Summary

2.1 Letter of Introduction

April 24, 2025

City of Fort Lauderdale
RFP Event# 455
ypascual@fortlauderdale.gov

RE: RFP# 455 Community Development Block Grant Disaster Recovery (CDBG-DR)

Dear Evaluation Committee,

IEM International, Inc. (IEM) is pleased to offer our proposal to provide the City of Fort Lauderdale with Technical Assistance on behalf of the US Department of Housing and Urban Development (HUD) for its Community Development Block Grant-Disaster Recovery (CDBG-DR) program. We have spent nearly 40 years preparing for, responding to, and recovering from disaster events. **Our objective is to support the City, its team, and the community organizations driving recovery efforts.** The City of Fort Lauderdale has been allocated approximately \$88 million in CDBG-DR funds for disaster recovery, presenting a tremendous opportunity to rebuild from the 2023 storms and strengthen the City's long-term resilience. With our extensive experience handling some of the most complex disasters, we will guide the City in navigating federal funding and policies related to disaster response and recovery. We offer best practices and lessons learned from other disasters to consider and follow community-led action in rebuilding stronger than before.

Company Background and Qualifications: As a disaster recovery and emergency management consulting firm, we are called upon to be in place before a disaster event begins, as they occur, and for the long haul as the City rebuilds and recovers. IEM was founded in 1985 and is an S Corporation and is headquartered in Raleigh, North Carolina. We have one office in Tallahassee, Florida and six additional offices across Louisiana, North Carolina, Virginia, and Puerto Rico. We will perform the requested services in a hybrid capacity (remote/onsite). We will start by leveraging IEM's existing Tallahassee office, and our teaming partner Nan McKay & Associates, Inc. who has three local offices in Miami, Miami-Gardens, and Lakeland. Together, we bring the City of Fort Lauderdale: the IEM Team. As requested by the City, we will embed our staff in City offices and open a location in City limits. **We discuss our staffing model and provide resumes, demonstrating our capacity and the expertise required to implement the City's CDBG-DR program, in the section following our letter of introduction.**



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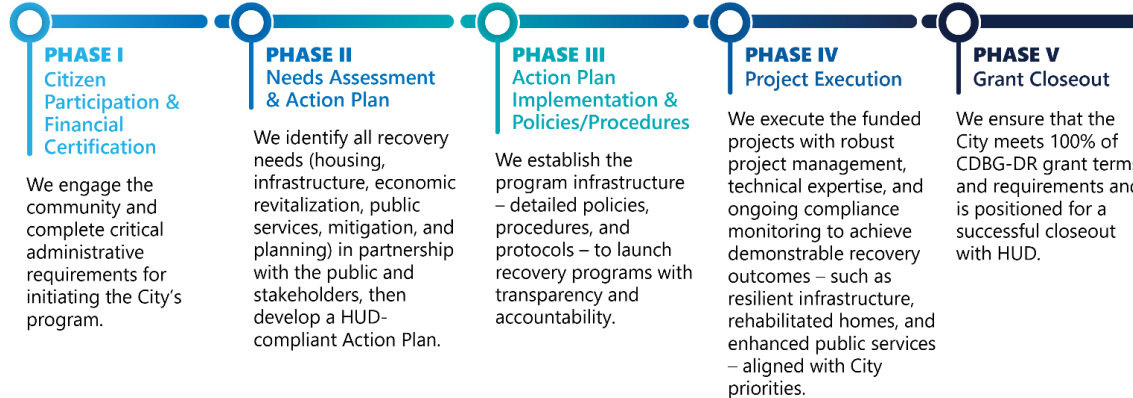
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The IEM Team brings the expertise, strategic vision, and time-proven methodologies needed to guide this effort from initial planning through final closeout. We have extensive experience managing CDBG-DR programs and knowledge of the federal requirements (including Public Law 118-158 and HUD's Universal Notice FR-6489-N-01). We will provide comprehensive management services to the City, ensuring full compliance at every step while uplifting the City's recovery goals through innovative program design. **Our approach aligns with Fort Lauderdale's broader vision: the**

City's Advance 2040 Comprehensive Plan emphasizes hazard and natural disaster resiliency and recovery, and the FY 2025 Commission Priorities dedicate significant resources to resilience and infrastructure improvements. We offer the City the following proposal - designed to turn those strategic priorities into action on the ground.

Proposed Solution & Highlights of our Approach: To achieve this, **we will implement a structured five-phase strategy mirroring the tasks outlined in the RFP.** The figure below depicts the five phases and the main objectives we will accomplish. This phased approach helps ensure all federal deadlines and requirements are met in a timely manner while maintaining a clear organization of activities. Throughout all phases, we will coordinate closely with City staff and leadership and proactively solve problems to keep your recovery on track.



Commitment to Speed, Transparency, and Local Impact: **The IEM Team's strategy is built on partnership and prudence.** We bring our proven methodologies and innovative tools to maximize the impact of every CDBG-DR dollar, while maintaining strict compliance with governing regulations. Our approach emphasizes inclusive citizen participation, responsible financial stewardship, and strategic alignment with local plans. By engaging Fort Lauderdale's neighbors in the process and prioritizing projects that build resilience - for example, stormwater improvements and housing mitigation measures that complement the City's ongoing Fortify Lauderdale infrastructure program - we ensure that the recovery effort leaves the City stronger and better prepared for the future.

Throughout this proposal, we will demonstrate that IEM is the best choice to provide the personnel, equipment, and expertise that the City needs to address the services requested in this RFP. Our proposal outlines our firm and staff experience, approach to the scope of work, references and past performances, forms, and other elements required by the RFP. For contractual questions, please contact Contract Administrator Ms. Maria Badaracco at (919) 990-8191 or contracts@iem.com. For technical questions,



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please contact Tim Lagudi, Director of Citizen Services at (917) 940-2707 or tim.lagudi@ieminc.com. Our proposal has been submitted by Keith Reynolds, Director, Contract Operations and Compliance, who is an authorized representative of IEM and is authorized to contractually bind the business entity. We provide a corporate resolution of Mr. Reynolds on the following page evidencing that the individual submitting the proposal, does in fact have the required authority stated herein.

We would be honored to work alongside you, implement this plan, and realize your vision. Thank you for this opportunity.

Sincerely,

DocuSigned by:
A blue ink signature of Keith Reynolds.
964FBB635BAD47E...
Keith Reynolds,

Director, Contract Operations and Compliance

**RESOLUTION OF THE BOARD OF DIRECTORS OF
IEM INTERNATIONAL, INC.**

FEBRUARY 15, 2025

Acting pursuant to the Delaware General Corporation Law (“DGCL”) and the Articles of Incorporation and Bylaws of IEM International, Inc., a Delaware corporation engaged in business under the trade name of “IEM” (the “Corporation”), the Corporation’s Board of Directors (the “Board”) hereby adopts, affirms, approves, and ratifies the following recitals and resolutions:

WHEREAS, the Board has determined that for the Corporation’s operations and risk management to function properly and efficiently, it is necessary and prudent to delegate certain authorities.

RESOLVED that Mr. Keith R. Reynolds, in his capacity as Director of Contract Operations and Compliance for the Corporation, be authorized, empowered, and directed in the name and on behalf of the Corporation to take or cause to be taken the following actions in accordance with the Corporation’s policies and operational procedures:

- To negotiate, make, amend, execute, and deliver, or cause to be negotiated, made, amended, executed, and delivered, contracts, agreements, other legal instruments, compliance documents, responses to solicitations for contract opportunities, and any ancillary instruments necessary to effect the foregoing, and to undertake actions necessary to ensure that the Corporation adheres to applicable laws, regulations, and Corporation policies.
- To incur and pay, or cause to be incurred and paid, such expenses, fees, and taxes as shall, in Mr. Reynolds’ opinion, be deemed necessary, advisable, or appropriate, and the taking of any such action or the preparation, delivery, execution, or filing by Mr. Reynolds of any of the foregoing or the payment of any such expenditures shall conclusively establish authority therefor from and the approval of the Corporation to effectuate or carry out fully the purpose and intent of all of these resolutions.

RESOLVED that any actions heretofore taken by Mr. Reynolds in connection with the matters contemplated hereby are adopted, affirmed, approved, and ratified in all respects as the act and deed of the Corporation.

RESOLVED that Mr. Reynolds shall exercise these authorities with due diligence and in accordance with the Corporation’s best interests, adhering to all applicable laws, regulations, and ethical standards.

RESOLVED that a copy of these resolutions shall be filed with the minutes of the Board’s proceedings.

CERTIFICATE

I, Bradley L. Tiffée, the undersigned Assistant Secretary and the custodian of the books, records, and seal of the Corporation, hereby certify that the foregoing is a true, accurate, and complete record of the resolutions duly adopted by the Corporation’s Board in accordance with the DGCL and the Corporation’s Articles of Incorporation and Bylaws on the date aforesaid and that said resolutions are in full force and effect without amendment or rescission.

WITNESS my hand and seal of the Corporation this 15th day of February, A.D. 2025.



Bradley L. Tiffée

2.2 Key Personnel Experience

IEM is proud to bring a team of nationally recognized experts with full-spectrum CDBG-DR planning, implementation, and grants management experience for Fort Lauderdale's recovery. Our team is built specifically to manage, implement, and close out federally funded recovery programs like yours. Every key individual we've proposed is already on board, active in CDBG-DR operations, and ready to serve the City of Fort Lauderdale.

Deep Bench. Unmatched Experience. High Impact. Zero Learning Curve.

We understand Fort Lauderdale's expectations for this program: fast mobilization, flawless compliance, and transformative results. We selected our team for Fort Lauderdale based on one clear standard: Can they deliver all three? That answer is a resounding yes.

We're not offering theoretical expertise. We're bringing practitioners with years of intimate experience designing programs and delivering outcomes for HUD and other federally funded housing, infrastructure, and economic revitalization programs in jurisdictions like yours. Each member of our team is experienced in:

Designing and executing full-lifecycle CDBG-DR programs from launch to HUD closeout.	Navigating the HUD Universal Notice, Public Law 118-158, and all applicable cross-cutting requirements (including Davis-Bacon, URA, Section 3, and 24 CFR Part 58).	Using the Disaster Recovery Grant Reporting (DRGR) System and preparing HUD-compliant reporting.	Supporting a range of clients, from small municipalities to large urban centers, with complex governance needs.
--------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------

Our team for Fort Lauderdale has recently assisted with disaster recovery efforts in:

 NEW YORK RISING Superstorm Sandy Housing Recovery	 NEW JERSEY REHABILITATION Reconstruction, Elevation, & Mitigation (RREM) Program - Superstorm Sandy	 RESTORE LOUISIANA Great Floods of 2016 Housing Recovery
 PUERTO RICO HOME REPAIR, RECONSTRUCTION, OR RELOCATION (R3) Hurricanes Irma and Maria	 REBUILD FLORIDA Hurricane Irma Housing Recovery	 REBUILD NORTH CAROLINA Hurricane Matthew Housing Recovery
 TEXAS GLO HOMEOWNER ASSISTANCE PROGRAM Hurricane Harvey	  DISASTER RECOVERY PROGRAM ADMINISTRATION Harris County, Texas	  CDBG-DR, CRF, ERAP, AND EMERGENCY MORTGAGE ASSISTANCE State of South Carolina
  DISASTER RECOVERY PROGRAM ADMINISTRATION & PROJECT MANAGEMENT City of Joplin, Missouri		

We're ready to bring that same precision, innovation, and dedication to Fort Lauderdale.

Local Presence. Immediate Deployment.

The IEM Team's edge isn't just our national depth—it's rooted in local reach. Our team includes:

- Nearly 300 staff already in Florida, including Fort Lauderdale and surrounding counties.
- Two offices within a 30-minute drive of Fort Lauderdale City Hall.
- Nan McKay & Associates, our team member and nationally recognized local firm with longstanding experience providing implementation, monitoring, training, and technical assistance services to local governments.

Many of our proposed staff have worked directly with the City or neighboring jurisdictions. They know and understand the permitting process, local workflows, and municipal operations. **We offer a ready-to-go deployment model—staff can be onsite, in your offices, with City teams on day one. We're here to serve you.**

Scale, Stability, and Staying Power

The IEM Team isn't just available – **we're committed to serving Fort Lauderdale and helping you realize your strategic vision.** Our proposed team has a combined tenure of over 85 years. That means **continuity, trust, and no disruption** to delivering Fort Lauderdale's desired outcomes.

Our staffing model also includes:

- **Surge capacity:** We can deploy additional recovery personnel within 48–72 hours, as needed.
- **Technical experts on call:** Environmental, engineering, legal, and finance professionals are ready to plug in to support specialized tasks.
- **Dedicated coverage:** Our Fort Lauderdale-based personnel will be available for on-site engagement throughout the project.

Led by Floridians. Backed by National Leaders.



Bryan Koon

IEM is led by President and CEO Bryan Koon, a Florida native and former Executive Director of the Florida Division of Emergency Management (FDEM - where he served as Vice Chair of Florida's Domestic Security Oversight Council. He led 250 personnel at FDEM and coordinated the efforts of dozens of governmental and non-governmental organizations during activations of the State Emergency Response Team.



Marion McFadden

Ms. McFadden served as Principal Deputy Assistant Secretary for Community Planning Development at HUD. She was appointed to lead teams in more than 40 offices across the nation, administering a total grant portfolio of more than \$60 billion, spanning more than two dozen programs. She has worked with CDBG-DR funds since 9/11.



Tim Lagudi

Mr. Lagudi has managed over \$2 billion CDBG-DR funded housing recovery programs for 70,000 combined applicants across four deliveries. During his tenure as Program Manager for Rebuild Florida, average monthly home completions surged 400% in the six months following the IEM Team's assumption of full construction management responsibilities. As a certified PMP and Lean Six Sigma Master Black Belt, his approach to program design reduces waste and process variation to maximize benefits to communities.



Nadienka Sanz

Ms. Sanz served as the Program Manager for the Puerto Rico Homeowner's Assistance Program (HAP), which was the first of all HAF programs to successfully disburse 100% of available funds. She has an extensive background in CDBG-DR programs, including the Rebuild Florida Program and Puerto Rico R3 Program. Ms. Sanz also worked for Broward Regional Health Planning Council for Tenant Based Rental Vouchers, Housing Opportunities for Persons with AIDS (HOPWA).

We know Florida. We know Fort Lauderdale. And we know how to get recovery done right.

The IEM Team also brings the best and the brightest individuals to serve Fort Lauderdale, providing best practices captured from essentially **every major recovery program across the country for nearly four decades**. We bring;

- **Unrivaled knowledge** from disaster recovery program management and team leadership.
- **Decades of experience** implementing programs from various funding sources, including, CDBG-DR, CDBG-MIT, FEMA IA, FEMA PA, Hazard Mitigation Assistance, HAF, and SBA.
- **Innovative tools, processes, and best practices** used for disaster recovery programs, following some of the nation's biggest disasters.

The figure below depicts the SMEs we offer the City of Fort Lauderdale.



We've honed our skills through decades of experience implementing complex recovery programs. We are prepared to help you tackle challenges and achieve outcomes that matter.

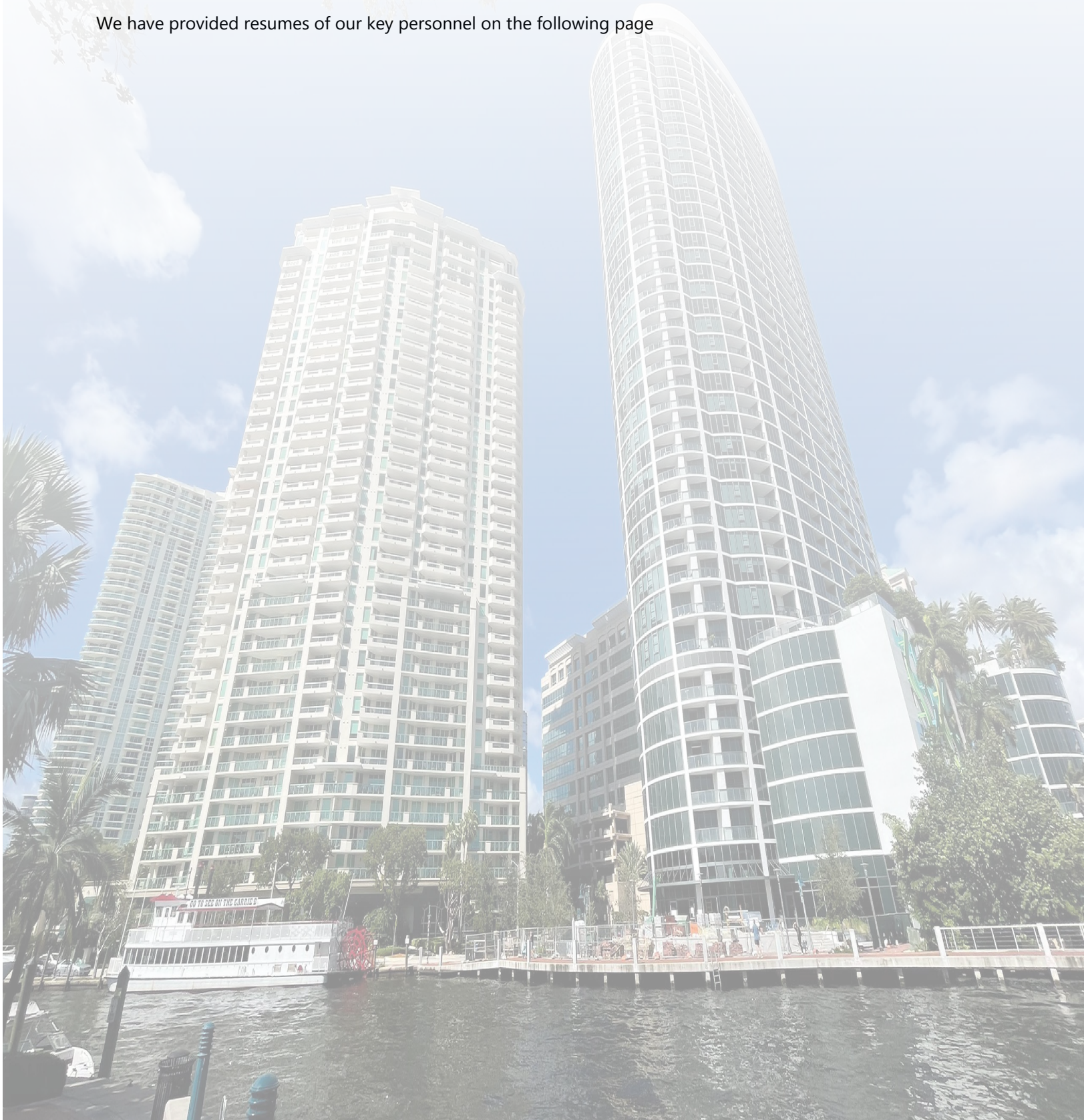
2.2.1 Key Staff and Office Location

Each member of our proposed key personnel roster has a proven track record of exceeding expectations on projects just like this one. As required by the RFP, the table below identifies the officers, principals, supervisory staff, and key individuals who will be directly involved with the work and their office locations.

Name	Role	Position Type	Office Location
Madhu Beriwal	IEM's Founder and Chair of the Board of Directors	Officer	Hybrid (Remote/On-site as needed)
Bryan W. Koon	IEM's President and Chief Executive Officer	Officer	Hybrid (Remote/On-site as needed)
Bradley L. Tiffie	IEM's Secretary and Chief Administrative Officer	Officer	Hybrid (Remote/On-site as needed)
John M. Schlegel	IEM's Treasurer and Chief Financial Officer	Officer	Hybrid (Remote/On-site as needed)
Allison L. Patrick	IEM's Chief Growth Officer	Officer	Hybrid (Remote/On-site as needed)
Marion McFadden	IEM's Vice President Disaster Recovery	Principal	Hybrid (Remote/On-site as needed)
Tim Lagudi, PMP	Project Executive	Project Executive/Supervisory Staff	Hybrid (Remote/On-site as needed)
Horacio Umfurer	Project Accountant	Fort Lauderdale Project Team	Onsite
Daniela Nuñez, MUP	Project Grants Consultant	Fort Lauderdale Project Team	Onsite
Nadienka Sanz	Project /Program Manager	Project Executive/Supervisory Staff	Onsite
Kera Package	Policy and Procedures / Consultant (Short-term)	Fort Lauderdale Project Team	Hybrid (Remote/On-site as needed)
Natasha Markman	Technical Consultant	Fort Lauderdale Project Team	Onsite
Karen Gonzalez	Administrative Support	Fort Lauderdale Project Team	Hybrid (Remote/On-site as needed)

2.2.2 Resumes

We have provided resumes of our key personnel on the following page



TIM LAGUDI

Project Executive



Education: International Marketing, SUNY Empire State College, 2013 | Advertising and Marketing Communications, Fordham University, 2005-2007

Years of Experience: 12+ in CDBG-DR/MIT Program, Construction, & Production Management

PROFESSIONAL QUALIFICATIONS

Mr. Lagudi has over 12 years of experience in project management, data analysis, project reporting, personnel management, and policy and procedure development for CDBG-DR programs. Throughout his career, he has demonstrated expertise and training in the following areas: project management, financial management and audits, property disaster recovery, compliance and monitoring, policy and reporting including data analysis, labor standards compliance, fair housing/equal opportunity compliance, construction management/monitoring, fund recapture and recovery, and environmental review compliance and procedures. Mr. Lagudi has directly managed over \$2 billion in CDBG-DR-funded housing recovery programs for 70,000 combined applicants across four deliveries.

RELEVANT PROJECT EXPERIENCE

IEM, 2017-Present

Director, Citizen Services, 2017-Present

- Oversees IEM's portfolio of CDBG-DR-funded program deliveries and energy programs funded by the Bipartisan Infrastructure Law (BIL) and Inflation Reduction Act (IRA).

Rebuild Florida Irma HRRP, Production & Program Manager, 2019-2024

- Assumed Program Manager role in April 2021. From that time, the program completed an average of 162 homes per month through 2021, with a peak monthly performance of 194 homes.. Monthly home completions surged 400% in the six months following IEM's assumption of full construction management responsibilities.
- Under his leadership, the program completed 3,726 homes and has completed closeout on 3,267 projects.
- Overhauled and enhanced production reporting and analytics, resulting in a 200-300% increase in production.

Rebuild NC, Program Manager, 2018-2019

- Served as Program Manager for CDBG-DR Program RebuildNC to assist qualified low- and moderate income families and individuals in North Carolina.

Restore Louisiana, Program Manager, 2017-2018

- Managed pilot program – assisting 40 homeowners and disbursing funds during the first month of implementation.
- Provided oversight to all core program functions – from Intake to Closeout.

NY Rising, Program Manager, 2013-2017

- Coordinated across-the-board data control for intake centers and Anti-Fraud Waste Abuse (AFWA), Title, Verification of Benefits, and closeout quality control teams.

CERTIFICATIONS AND TRAININGS

- Project Management Professional (PMP), Project Management Institute
- Lean Six Sigma Master Black Belt, Six Sigma Global Institute
- Certified Agile Leadership, Six Sigma Global Institute
- Certified Process Improvement Specialist, Six Sigma Global Institute

HORACIO UMFURER

Project Accountant

Education: FAEC, Buenos Aires, Argentina, International Business

Years of Experience: 20+ in Finance and 7+ in HCV Program



PROFESSIONAL QUALIFICATIONS

Mr. Umfurer has experience establishing compliance and monitoring structures for federal programs, including developing compliance and testing checklists. He has worked in monitoring, reporting dashboards, and conducting risk assessment reviews for compliance. He has extensive experience identifying and evaluating federal regulatory requirements to ensure compliance. In his current role at Nan McKay, he plans, directs, and coordinates finance activities related to the Housing Choice Voucher (HCV), ensuring compliance with HUD and GAAP regulations. Before his experience at Nan McKay, he served as a Financial Compliance Manager for the Chicago Housing Authority, overseeing the annual department budget and HCV Program operating expenditures, including contract budgets.

RELEVANT PROJECT EXPERIENCE

Nan McKay & Associates, Inc., 2018-Present

Various Roles, Finance Manager, 2018-Present

- Oversee 154 million annual HCV Program budget.
- Oversee the IT Department and Reporting.
- Manage Portability billing and payments, new vendor accounts, and collections efforts.
- Prepare financial reports and forecasts.
- Ensure compliance with local, state, and federal laws.

Associate II, Harris County, Texas

- Nan McKay & Associates, in support of the Guidehouse team, assists Harris County with programming related to Harris County's COVID-19 Relief funding and related grants. In addition to legislative analyses, technical assistance, and program development, Nan McKay & Associates has assisted with identifying non-profit partners to act as program administrators for various COVID-related recovery programs. Nan McKay & Associates has established compliance and monitoring structures for both the Small Business Relief Program and the Rental Assistance Program.
- Developed compliance and monitoring checklists, testing checklists, and monitoring reporting dashboards for review of the Small Business Relief Program.
- Conducted initial risk review of subrecipient administrator.

Kiruna Credit, Cordoba, Argentina, 2015-2017

Internal Auditor, 2015-2017

- Ensure compliance with established internal controls and procedures.
- Examine company accounts and financial control systems.
- Examine records, reports, operating practices, and supporting documentation.

CERTIFICATIONS AND TRAINING

- HCV Executive Management
- HCV Financial Accounting and Reporting
- HCV Program Management
- HCV Financial Management

DANIELA NÚÑEZ

Project Grants Consultant



Education: M.A., City & Regional Planning, Rutgers University, 2017

B.A., Urban Studies & Planning/Ethnic Studies, University of California, San Diego, 2014

Years of Experience: 7+ in Federal Grants Management & Compliance

PROFESSIONAL QUALIFICATIONS

As an NMA senior consultant, Daniela Núñez has worked on the creation of CDBG-DR-funded housing programs in various municipalities, including most recently in the Midwest, where she focused on compliance monitoring and closeout. She has also recently worked on projects in Texas and Puerto Rico, providing grant administration, technical assistance, and training materials to CDBG-DR grantees. Ms. Núñez is a strong leader with long-term hands-on experience in procurement, state and federal regulations, grant administration, and disaster recovery.

RELEVANT PROJECT EXPERIENCE

Nan McKay & Associates, Inc., 2019-Present

Various Roles, Senior Consultant, 2019-Present, Consultant, 2017-2019

Compliance Monitor, City of Joplin, Missouri, 2017-2019

- Manages, defines, plans, and executes all aspects of a project lifecycle.
- NMA created the Joplin Homebuyer Assistance Program, which has provided over \$13 million in DR assistance to approximately 500 families in an expedited timeframe. Ms. Núñez currently provides support for ongoing monitoring and manages all related technical programmatic issues.
- Specializes in regulatory compliance as it relates to both infrastructure and affordable housing.
- Conducts the compliance monitoring and technical assistance for subrecipients and city projects.
- Facilitates and guides client communications.
- Creates technical assistance materials and training workshops for grantees, subrecipient staff, and contractors.
- Specializes in community outreach.
- Oversees the closeout process for the CDBG-DR grantee.

Associate, Harris County, Texas, 2018-Present

- Provides project support for the creation of nine housing programs that benefit low—and moderate-income individuals, including temporary housing, down payment assistance, residential buy-out, and rehabilitation reconstruction.
- Assists with developing resiliency programming for infrastructure, housing, and economic development for the county through creating a commercial buyout program.
- Facilitates grant startup activities, including action plan development, program design, development of program guidelines, and standard operating procedures.
- Provides support for all redevelopment activities.

Associate, Santa Monica, California – COVID, May 2020-June 2020

- Provided technical assistance and research for health care systems in Santa Monica regarding COVID-19 and federal funding available.
- Conducted an extensive review of policy documents submitted to FEMA for grant consideration.

CERTIFICATIONS AND TRAINING

- FEMA Emergency Protective Measures

NADIENKA SANZ

Project/Program Manager

Education: A.A.S. Human Services, University of Phoenix, 2010

Years of Experience: 14+ in Program Management and HUD Regulations



PROFESSIONAL QUALIFICATIONS

With over 14 years of experience in Federal Funds Management and more than seven years of experience with CDBG-DR funds management programs in Florida and Puerto Rico, Ms. Sanz served as a Program Manager for the Puerto Rico Homeowners Program (HAP), which was recognized by the National Council of State Housing Agencies (NSCHA) as the first program ready for operations after receiving approval from the Department of Treasury; it exceeded all Treasury and client expectations, completing over 85% of applications within three months and disbursing over 50% of allocated funds in less than a year, before that assignment. After Hurricane Maria, Ms. Sanz served as Housing Manager for the Puerto Rico R3 CDBG-DR Recovery Program. She was key to the success of the Original R3 Intake Eligibility application. Ms. Sanz was also an Intake and Eligibility Manager for the Rebuild Florida Program, managing ten intake centers and over 80 staff members. She is an efficient and proactive manager with exceptional analytical and strategic skills that translate to programs with higher performance and predictable positive success rates. She has also previously worked in for Broward Regional Health Planning Council for over 10 years.

RELEVANT PROJECT EXPERIENCE

IEM, 2018-Present

Various Roles, Program Manager, The Puerto Rico Homeowner Assistance Program (PRHAF), 2021-2023

- Managed 75 million dollars in the federally funded Program.
- Conducts management oversight for the timely execution of operations.
- Provides overall coordination, accountability, and administrative oversight to staff in other assigned roles, ensuring consistency of service and a seamless customer experience.

Project Manager, Repair, Reconstruction, or Relocation (R3) Program, 2020-2021

- Maintained a complete understanding of all applicable Program policies, requirements, and procedures.
- Led day-to-day program management activities and directly supervised CDBG-DR case managers.

Intake and Eligibility Project Manager, Rebuild Florida Program, 2019-2020

- Maintained a complete understanding of all applicable Program policies, requirements, and procedures.
- Led day-to-day program management activities and directly supervised CDBG-DR case managers.

Broward Regional Health Planning Council, 2006-2016

Various Roles, Housing Program Supervisor for Tenant Based Rental Vouchers, Housing Opportunities for Persons with AIDS (HOPWA), 2006-2016

- Maintained effective communication with property owners, vendors, and utility companies.
- Created internal and external control reports as requested by the program director.

CERTIFICATIONS AND TRAINING

- CDBG-MIT Federal Register Notice
- CDBG and CDBG-DR Updates and Clarifications to Procurement Requirements

KERA PACKAGE

Policy and Procedures Consultant (Short-term)

Education: B.A., American University, 2010

Years of Experience: 15 in Policy, Communications, and Operations



PROFESSIONAL QUALIFICATIONS

Ms. Package is a dedicated professional with over 15 years of leadership experience across federal, nonprofit, and private sector organizations. As Deputy Assistant Secretary for Grant Programs at HUD, she was appointed by the Biden Administration to lead a 200+ person team, overseeing a grant portfolio of nearly \$5 billion annually across 1,200+ grantees and \$10 billion in supplemental funding for pandemic recovery. Her portfolio also included oversight of HUD's Office of Environment and Energy and Office of Disaster Recovery, responsible for \$100+ billion in CDBG-DR funding. Ms. Package excels at policy innovation, procedure and process development, budget formation, operational efficiency, strategic planning and communications, and designing creative solutions to boost housing supply, address land use barriers, and advance local community development priorities.

RELEVANT PROJECT EXPERIENCE

IEM, February 2025-Present

Director, Disaster Recovery, February 2025-Present

- Supports IEM's Disaster Recovery Sector by providing subject matter expertise on CDBG-DR funding and requirements, operational strategy, policy, program design, and proposal development.

U.S. Department of Housing and Urban Development, 2024-2025

Deputy Assistant Secretary for Grant Programs, 2024-2025

- Appointed by the Biden Administration to lead a 200+ person team, overseeing a grant portfolio of nearly \$5 billion annually across 1,200+ grantees, \$10 billion in supplemental funding for pandemic recovery, and the Office of Disaster Recovery - responsible for \$111 billion in disaster recovery and mitigation grants across 200+ grantees.
- Directly managed a team of senior executives responsible for the Department's environmental and energy policies and affordable housing, community development, and disaster recovery grant programs.
- Designed and administered two groundbreaking competitive CDBG grant programs, investing \$185 million to reduce barriers to affordable housing production (PRO Housing) and \$235 million to support the revitalization of manufactured housing communities (PRICE).
- Launched a \$250 million initiative to boost local housing supply strategies through federal financing - accelerating the loan approval process, elevating promising practices, and generating 75+ transformative project proposals.
- Represented HUD on the Interagency Policy Committee for Housing Supply and as a subject matter expert for external engagement, covering topics such as housing innovation, transit-oriented development, and land use strategies, during stakeholder engagements, grantee training, and press conferences.

Office of Community Planning & Development (CPD), 2021-2024

Various Roles, Chief of Staff, CPD, 2023-2024, **Policy Advisor, CPD**, 2022-2023, **Special Assistant, CPD**, 2021-2022

- Advised senior executives on policy, programs, communications, operations, and organizational improvements.
- Realigned organizational structure and enhanced field capacity - establishing a regional management framework to support 44 offices, modernize workflows, and improve data analytics.
- Published updated guidance and toolkits to spur CDBG investments in locally-driven housing initiatives.

NATASHA MARKMAN

Technical Consultant



Education: M.A., Marriage and Family Therapy, NOVA Southeastern University

B.S., Behavioral Science, Lynn University

Project Management Institute, PMP

Certified Community Health Worker, CCHW

Years of Experience: 20+ in Program Development & Federally-Funded Program Management

PROFESSIONAL QUALIFICATIONS

With 20 years of experience in program development, management, and leadership roles across various industries and funding, Ms. Markman brings a results-oriented, collaborative approach to every project she undertakes. As Case Manager at IEM, she has successfully overseen the eligibility review of nearly 22,000 applications, leading to the cumulative award of \$246,000,000, disbursed to 18,000 homeowners. Her ability to manage complex programs, streamline processes, and collaborate effectively with interdepartmental teams and clients has consistently driven project success and ensured compliance with organizational objectives. Ms. Markman is adept at leading large teams, quality control and audit reporting, process development, and project lifecycle management.

RELEVANT PROJECT EXPERIENCE

IEM, October 2024-Present

Various Roles, Project Manager, IA, and Disaster Housing, South Carolina (Hurricane Helene)

Case Management Manager, North Carolina Homeowner's Assistance Fund (NCHAF, US Treasury Program), June 2022-October 2024

- Provided support with day-to-day project management activities for case management, which include monitoring, reporting, specialized advisory services, and applicant consultation services, as applicable.
- Maintained a complete understanding of all applicable program policies, requirements, and procedures within established guidelines.
- Managed individual workload, productivity, and communications that enable accurate, efficient, and policy-compliant processing.

Broward Regional Health Planning Council, Inc. (BRHPC), 2008-2022-Present

Various Roles, Program Director, 2017-2022, Program Manager, 2014-2017, Assistant Program Manager, 2008-2014, Centralized Intake Eligibility Determination & Health Insurance Continuation Program, 2017-2022

- Ensured all eligibility and enrollment requirements were identified, and achievement strategies were developed and met through collaboration with the RW Part A Grantee for about 8,500 clients.
- Provided oversight of eligibility determination for Ryan White Part A services and benefits provided by third-party payers, including private, federal, state, and local funding programs.

CERTIFICATIONS AND TRAININGS

- Project Management Institute, PMP
- Certified Community Health Worker (CCHW)
- Women Leading Broward
- Leadership Broward
- Broward Regional Health Planning Council
- Broward County Child Abuse Death Review Team
- Victim Advocate for Women Affected by Domestic Violence

KAREN GONZALEZ

Administrative Support

Education: Economics, University of California, Santa Cruz

Years of Experience: 10+ in Administrative Support



PROFESSIONAL QUALIFICATIONS

Ms. Gonzalez has more than ten years of experience in administrative roles. She has advanced Mac and Windows desktop knowledge and is skilled in using Outlook, Word, Excel, PowerPoint, and SharePoint. Ms. Gonzalez is customer-service oriented; she works well under pressure, has strong communication skills, is keen on problem-solving, and quickly adapts to learning in fast-paced environments. Ms. Gonzalez is adept at multitasking, able to adapt to technological advancements, and fluent in English and Spanish.

RELEVANT PROJECT EXPERIENCE

IEM, 2022-Present

Various Roles, Administrative Support, FEMA Support to Chemical Stockpile Emergency Preparedness Program, 2022-Present

- Work for a natural disaster recovery company that provides administrative support to the FEMA Headquarters Chemical Stockpile Emergency Preparedness Program staff.
- Review FEMA HQ staff payroll and support in Human Resources administrative paperwork.

Receptionist/Administrative Assistant, 2020-2022

- Worked front desk support for a natural disaster recovery company.
- Directed calls for the main HQ phone lines while extending excellent customer service by following strict protocol with our incoming guests at the office.

AB&B Management, 2018-2019

Account Specialist, 2018-2019

- Work with multiple dental offices to verify insurance for treatment, manage the database for insurance plans, and maintain patients' current eligibility status.
- Verify insurance coverage and benefits.

Cary Lee Family Dentistry, 2016-2018

Office Front Desk, 2016-2018

- Worked at the front desk as an office manager and building manager assistant, running day-to-day operations at a family-owned dental office/JS property building.
- Assisted in supervising dental clinic personnel and patient scheduling, billing, dental insurance, and treatment planning.

CERTIFICATIONS AND TRAINING

- Professional Development Series_ certificate
- IS-230 Fundamentals of Emergency Management
- IS-235 Emergency Planning
- IS- 240 Leadership and Influence
- IS-241 Decision Making and Problem-Solving
- IS-242 Effective Communication
- Confidential- Level Clearance, Active (April 2022- Present)

3.0 Experience of the Firm and Key Personnel Experience

3.1 Years of Experience Providing Consultancy Services



For more than 40 years, IEM has provided disaster recovery and emergency management consultancy services. IEM has directly managed local and state-wide grant programs while maintaining decades-long relationships with the U.S. Department of Housing and Urban Development (HUD), the U.S. Department of Treasury, Federal Emergency Management Agency (FEMA), and other federal agencies. IEM has supported federal agencies, states, counties, and cities as they prepare for, respond to, and recover from the worst disasters in U.S. history.

To date, **IEM has managed over \$277 billion in federal grant assistance programs, processing over 17 million applications with zero clawbacks. We have managed over \$19.3 billion in CDBG-DR funding, including 15 CDBG-DR/MIT contracts** for nine agencies, aiding communities across the country in their locally driven recovery efforts. Additionally, IEM is a leader in providing technical assistance for HUD and other federal agencies. Since 2016, our team has been selected by HUD to be a Community Compass Technical Assistance (TA) Provider, completing 19 TA projects. We have been awarded a recompetes seven times between FY2016 and 2024, demonstrating HUD's faith in our expertise.

IEM has Supported the City of Fort Lauderdale



IEM supported the State of Florida in a CDBG-DR housing recovery program for over six years. In this contract, we served 8,221 residents throughout the State of Florida. **Of these communities, we assisted Fort Lauderdale and Broward County directly. We assisted 902 Broward County residents (378 households) – including 131 residents in Fort Lauderdale (63 households).**



Since 2005, our experts have been on the ground assisting state, city, and county governments with management and planning of multi-scale CDBG-DR grants management deliveries in Florida, Mississippi, New York, New Jersey, Louisiana, Texas, North Carolina, and Puerto Rico. IEM provided comprehensive program design and implementation services for Florida's \$1.39 billion Hurricane Irma disaster recovery program.

The figure below provides an overview of some of our housing deliveries. We are committed to supporting the City's full community, including residents and the local workforce. We understand the profound trauma and disruption that recent hurricanes and flooding have inflicted, not only on families but also on the people who live, work, and serve in the impacted areas.

NJ RREM Hurricane Sandy CDBG-DR	PRDOH Non Federal Match Program	Investment Portfolio for Growth	Restore Louisiana 2016 Floods CDBG-DR
NEW JERSEY - 2017-2023	PUERTO RICO - 2019-PRESENT	PUERTO RICO - 2023-PRESENT	LOUISIANA - 2017-2021
VALUE: \$1.35B APPLICATIONS CLOSED: +2.1K	VALUE: \$1.5B APPLICATIONS CLOSED: +350K	VALUE: \$1.4B	VALUE: \$1.3B APPLICATIONS CLOSED: +13.1K
TX HAP Hurricane Harvey CDBG-DR	Rebuild FL Hurricane Irma CDBG-DR/MIT	ReBuild NC Hurricane Matthew CDBG-DR	PRDOH R3 Hurricane Maria CDBG-DR/MIT
TEXAS - 2018-PRESENT	FLORIDA - 2018-PRESENT	NORTH CAROLINA - 2018-2019	PUERTO RICO - 2019-PRESENT
VALUE: \$386M APPLICATIONS CLOSED: +2K	VALUE: \$1.39B APPLICATIONS CLOSED: +3.1K	VALUE: \$232M APPLICATIONS CLOSED: 1.9K	VALUE: \$1.5B APPLICATIONS CLOSED: +1.96K

IEM brings a deep understanding of HUD's regulations, statutes, policies, and procedures, gained through decades of on-the-ground experience in communities recovering from some of the nation's most devastating disasters. [Our team doesn't just read the rules—we wrote many of them.](#) Marion McFadden, proposed Project Executive, is renowned as a national expert in all aspects of CDBG-DR. She led the development of the inaugural Universal Notice governing this grant, so she brings unique insight into the flexibilities offered under the Universal Notice. She also has particular insight into preventing duplication of benefits, having drafted the core framework of HUD's duplication-of-benefits guidance during her time in HUD's Office of General Counsel. Our team will ensure that the Action Plan adheres to the latest HUD guidance, including the new HUD CDBG-DR Action Plan templates and compliance checklists, and existing and future updates to the Universal Notice.

In addition, we have selected Nan McKay & Associates as our subconsultant for this contract. [Nan McKay & Associates has supported the programming and distribution of billions of dollars in CDBG-DR funding nationwide. Their team provided Harris County, Texas with CDBG-DR action plan support, helping the County to receive \\$1.25 billion in CDBG-DR funding specifically for recovery programming from Hurricane Harvey.](#) More on their experience is provided in this section and [Section 7.0 Subconsultants](#).

IEM Is Invested in Florida

We are committed to maintaining a physical presence in the Sunshine State to effectively support our Florida-based customers. IEM has been a trusted partner to the State of Florida for nearly two decades, providing comprehensive response, recovery, and mitigation support in the wake of catastrophic hurricanes. Beginning with Hurricanes Frances and Ivan in 2004, IEM has continued to assist the state, most recently with the \$1.39 billion disaster recovery program related to Hurricane Irma. [Additionally, the IEM Team has nearly 300 Florida staff.](#)

"IEM has been a valued partner to the County, and remains flexible and adaptable to our changing needs, offering comprehensive consulting services as needed. IEM's staff have been professional and responsive, working hand in hand with County staff and stakeholders.

IEM has demonstrated that their team stays current with the latest regulatory and compliance changes to FEMA recovery programs, proactively advising us on solutions to ensure maximum reimbursement potential.

IEM has continued to maintain a high degree of professionalism and subject matter expertise, consistently meeting deadlines, and has met or exceeded all deliverable expectations to date. The IEM team continues to show outstanding skills at communicating and anticipating project needs, adjusting resources as necessary."

- Jonathan Lord, Emergency Management Director



IEM provided timely and immediate support to the Florida Division of Emergency Management (FDEM) during the state's continued Emergency Operations Center (EOC) activations in recent responses to Hurricanes Debby and Helene in 2024. In the past, IEM also provided support for Hurricanes Idalia and Ian. IEM's employees have deployed to support county EOC activations throughout the state, including Hernando County, Palm Beach County, Madison County, and Dixie County, on behalf of FDEM, with only a few hours' notice.



IEM is a Platinum Corporate Partner for the Florida Association of Counties (FAC). Our support of FAC enables it to serve and represent Florida's 67 counties effectively. As such, we are committed to FAC and its mission to help Florida's counties effectively serve and represent their communities through advocacy, collaboration,

and education.

IEM is also a corporate member of the Florida Emergency Preparedness Association. In this role, IEM supports the purpose of FEPA, which includes:

- To promote a professional emergency management organization composed of all emergency management disciplines.
- To promote professional expertise and diversity through training and education and sharing best practices.
- To promote and enhance the effective management and operation of professional emergency management offices and services throughout Florida.
- To study, research, collect, compile, and disseminate information about emergency management and related functions to federal, state, and local governments and other entities throughout the State of Florida.



A Note from Bryan Koon, IEM's President & CEO



When I started at FDEM in 2011, Chuck Hagan gave me a cell phone. I printed the phone number on my business cards and handed out thousands of them. When I left the Division in 2017, I asked to keep that number and printed it on my new business cards. Thousands more business cards later, my phone number is still the same. If you want to talk to me, just call. And the same will go for every person who works on this contract. If you need us, call. We'll be there for you, 24/7.

The map on the next page highlights IEM's strong ties and experience in assisting Florida organizations across all levels of government and service offerings. Nan McKay & Associates also has Florida experience and was selected by Miami-Dade County to manage over 18,000 Housing Choice Voucher contracts, including 193 homeownership vouchers, and 180 families participating in the Family Self-Sufficiency (FSS) Program. They earned Section Eight Management Assessment Program (SEMAP) High Performer status for seven consecutive years, with no single file audit findings. Nan McKay & Associates increased utilization to over 99%, overall file accuracy to over 90%, customer satisfaction to over 90%, and owner participation in the program by over 30%.

IEM recently was selected by Pasco County to develop their CDBG-DR action plan as a result of Hurricanes Helene and Milton. Pasco County is getting ready to dole out nearly \$600 million in relief funds.

Nan McKay & Associates has worked with 135 Agencies throughout the State of Florida in the last five years, including the Housing Authority of the City of Fort Lauderdale, Boca Raton Housing Authority, Broward County, Broward County Housing Authority, Hialeah Housing Authority, Hollywood Housing Authority, Miami-Dade County Public Housing and Community Development, City of Miami Department of Community Development, Palm Beach County Housing Authority, Pompano Beach Housing Authority, and West Palm Beach Housing Authority. We've highlighted a few of our past performances below:

Miami-Dade County Public Housing & Community Development (PHCD)	
Start & End:	2014 to 2024
Description of Work:	<p>Nan McKay & Associates serves as a long-term program administrator for Miami-Dade County PHCD, providing full-service administration of both emergency and ongoing housing assistance programs aimed at promoting housing stability and economic mobility for low- and moderate-income residents.</p> <p>Emergency Rental Assistance Program (ERAP)</p> <p>Applications Processed: Over 8,000</p> <p>Scope of Work:</p> <p>Full lifecycle administration of Miami-Dade County's Treasury-funded ERAP, including:</p> <ul style="list-style-type: none"> • Development and launch of a web-based application portal integrated with a proprietary case management system. • Staffing and training of all operational roles: intake specialists, case managers, compliance officers, supervisors, and call center representatives. • Eligibility determinations, documentation review, duplication of benefits verification, landlord validation, and audit-ready recordkeeping. • Bilingual applicant support via call center and helpdesk operations. • Compliance with all U.S. Treasury program rules and County-specific priorities. • Real-time reporting and dashboards to support fund obligation tracking and performance evaluation. <p>Housing Choice Voucher Program (HCV) Administration</p> <p>Vouchers Administered:</p> <ul style="list-style-type: none"> • 18,000+ total, including: <ul style="list-style-type: none"> ◦ 193 Homeownership Vouchers ◦ 180 Families in Family Self-Sufficiency (FSS) Program <p>Scope of Work:</p> <ul style="list-style-type: none"> • Comprehensive program management including eligibility determinations, inspections, HQS compliance, rent reasonableness, participant and landlord engagement, and payment processing. • Administration of specialized programs, including Homeownership and FSS, with tailored case management and financial empowerment coaching. • Ongoing training and technical assistance for PHCD staff. • Systems and compliance support to maintain audit readiness and federal compliance. <p>Performance Outcomes:</p> <ul style="list-style-type: none"> • SEMAP High Performer for seven consecutive years • Utilization Rate: Exceeded 99% • File Accuracy: Maintained over 90% accuracy across all reviewed case files • Customer Satisfaction: Surveyed satisfaction levels exceeding 90% • Landlord/Owner Participation: Increased participation by over 30%

Miami-Dade County Public Housing & Community Development (PHCD)

Public Housing Relocation

Nan McKay & Associates supported Miami-Dade County PHCD with the relocation and transition of public housing residents to tenant-based assistance as part of a larger repositioning and redevelopment strategy. The project involved both the coordination of the **physical relocation** and **administrative conversion** of public housing households to the Housing Choice Voucher (HCV) platform, in compliance with HUD's regulatory and operational frameworks.

Scope of Work**1. Relocation Planning and Implementation**

- Conducted a detailed **household-level needs assessment** including family size, accessibility requirements, language preferences, employment proximity, and voucher suitability.
- Provided multilingual engagement and one-on-one case management services to every household throughout the relocation process.

2. Voucher Transition Processing and System Integration

- Led the **end-to-end transition of public housing residents to tenant-based vouchers**, including income/rent recalculation, unit size determinations, and portability processing in accordance with HCV program rules.
- Created and maintained a **secure centralized database** that tracked resident status, relocation milestones, voucher issuance dates, housing inspections, and lease-up.
- Facilitated **data synchronization** between PHCD's public housing system and the HCV platform to ensure accurate and timely information transfer.
- Developed a **custom tracking and reporting dashboard** used by PHCD leadership to monitor utilization, unit turnover, compliance, and resident outcomes in real time.
- Coordinated with PHCD's IT and compliance teams to ensure HUD form alignment (HUD-50058), accurate EIV integration, and PIC data entry to prevent subsidy gaps or duplicate assistance.

3. Staff Training, Quality Control, and Compliance

- Trained PHCD and subcontracted staff on updated procedures for relocation, voucher briefing, lease-up processing, and rent reasonableness.
- Implemented **dual-layer quality control procedures** to validate income, documentation, and subsidy calculations, improving PH to HCV file accuracy to over 90%.
- Ensured that all relocation and conversion documentation was fully audit-ready, with time-stamped notices, resident acknowledgments, and correspondence logs.

4. Resident Support and Retention

- Delivered robust mobility counseling and landlord outreach to expand voucher leasing options, particularly for residents relocating from hard-to-house areas.
- Coordinated housing search support, transportation assistance, and voucher extension requests for families requiring additional time to locate units.
- Post-move follow-up was conducted with every family to resolve landlord issues, utility account transfers, and changes in household composition.

Outcomes

- **Successfully transitioned over a thousand public housing households to HCV assistance**, with no involuntary displacement and no HUD audit findings.
- Maintained comprehensive relocation and conversion files, passing all HUD, PHCD, and external audits without findings.

Miami-Dade County Public Housing & Community Development (PHCD)	
	<ul style="list-style-type: none"> Significantly expanded landlord participation to support lease-up of transitioned families, aligning with PHCD's broader voucher success strategy. Provided a scalable model for future repositioning efforts in the County's public housing portfolio. <p>Our consistent delivery of high-quality results, continuous improvement, and strong customer service approach has helped Miami-Dade County PHCD meet and exceed HUD and Treasury performance benchmarks, enhance program reach and efficiency, and ensure transparent stewardship of public funds.</p>

City Of Miami Department Of Community Development: Emergency Rental Assistance Program (ERAP) HQS Inspections	
Start & End:	2020 to 2023
Description of Work:	<p>ERAP</p> <p>Nan McKay & Associates successfully administered the Emergency Rental Assistance Program (ERAP) on behalf of the City of Miami, delivering end-to-end program operations under an expedited timeline to meet urgent community needs during the COVID-19 public health emergency.</p> <p>Key responsibilities included:</p> <ul style="list-style-type: none"> Custom Technology Deployment: Designed and launched a secure, web-based application portal integrated with our proprietary case management system, enabling applicants to submit documentation, track status, and receive timely notifications. Eligibility and Compliance: Oversaw all eligibility determinations in accordance with U.S. Treasury guidelines, including documentation review, duplication of benefits analysis, income verification, and landlord validations. Full-Service Operations: Provided all staffing and training necessary for program administration, including case managers, compliance specialists, intake support, and supervisors. Call Center and Applicant Support: Established a fully staffed bilingual call center and applicant support system to guide residents through the process and provide real-time assistance. Payments and Reporting: Disbursed \$23.98 million in rental and utility assistance to 2,674 qualified applicants, ensuring accurate documentation and audit-ready financial records for all payments. Reporting: Delivered consistent Treasury reporting to the City. <p>Our performance ensured the City of Miami was able to meet federal expenditure deadlines, maximize fund utilization, and serve vulnerable residents with timely and equitable assistance.</p> <p>HQS Inspections</p> <p>Nan McKay & Associates was contracted by the City of Miami to manage and administer the Housing Quality Standards (HQS) inspection program for its Housing Choice Voucher (HCV) portfolio. This included overseeing all initial, annual, special, and quality control inspections to ensure safe, decent, and sanitary housing for program participants and full compliance with HUD regulations and City standards.</p> <p>Scope of Services</p> <p>1. Full-Service Inspection Operations</p> <ul style="list-style-type: none"> Managed the full HQS inspection lifecycle, including initial inspections for move-ins, annual recertification inspections, complaint/special inspections, and quality control (QC) inspections in accordance with HUD guidelines. Scheduled and coordinated all inspections, maintaining close communication with tenants, property owners, and City of Miami staff to minimize missed appointments and optimize routing efficiency. Developed and implemented standardized inspection protocols aligned with the City's administrative plan and HUD's HQS checklist.

City Of Miami Department Of Community Development: Emergency Rental Assistance Program (ERAP) HQS Inspections

2. Certified Inspector Staffing and Training

- Deployed a team of **HUD-certified inspectors**, fully trained in HQS protocols, Fair Housing regulations, and customer service best practices.
- Conducted internal refresher trainings to maintain inspection consistency, ensure correct deficiency classification, and prepare for HUD audits or on-site reviews.

3. Technology and Reporting Systems

- Utilized a **mobile inspection platform** integrated with our proprietary case management system to enable real-time data entry, photo documentation, and automated report generation.
- Provided the City with detailed reporting dashboards and daily/weekly updates, including:
 - Inspection outcomes (pass/fail rates)
 - Common deficiency trends
 - Turnaround times and performance benchmarks
 - Compliance tracking and QC sampling results

4. Owner and Tenant Support

- Offered technical assistance to landlords on HQS standards, remediation requirements, and timelines for compliance.
- Communicated directly with tenants to ensure understanding of inspection results and next steps, particularly in units requiring emergency or life-threatening repairs.

5. Quality Control and Compliance

- Conducted **HUD-mandated QC inspections** on a statistically valid sample to assess inspector accuracy and maintain program integrity.
- Maintained audit-ready records for all inspections, with timestamped photos, detailed deficiency documentation, and correction follow-up.

Outcomes

- Conducted thousands of HQS inspections annually, with consistently high completion and compliance rates.
- Reduced turnaround times for unit approval and HAP contract execution through streamlined processes and technology integration.
- Contributed to the City's improved lease-up efficiency and overall HCV program performance by ensuring timely and thorough inspections.
- Provided the City with actionable data to inform landlord outreach, policy updates, and risk mitigation strategies.

Broward County Housing Authority: Housing Choice Voucher Program Support And Operational Assessment	
Start & End:	2019-2022
Description of Work:	<p>Nan McKay & Associates provided targeted technical and operational support to Broward County Housing Authority (BCHA) to assist with backlog reduction and improve overall efficiency in the administration of its Housing Choice Voucher (HCV) program. This included hands-on support for completing recertifications and processing new move-ins, as well as conducting a comprehensive operational assessment to strengthen long-term performance and compliance.</p> <p>Scope of Services</p> <p>1. Recertification and Move-In Processing Support</p> <ul style="list-style-type: none"> Assigned experienced housing specialists to work alongside BCHA staff and leadership to process interim and annual recertifications, ensuring compliance with HUD regulations and BCHA administrative plan policies. Verified income, deductions, and household composition; calculated tenant rent and HAP amounts; updated HUD Form 50058 and entered accurate data into BCHA's housing software system. Supported move-in processing, including initial eligibility reviews, voucher issuance, unit approval, rent reasonableness documentation, and HAP contract execution. Ensured quality control and audit readiness for all files handled, minimizing errors and maintaining documentation required for SEMAP and HUD reviews. Helped reduce the backlog of pending certifications and new admissions, enabling BCHA to improve responsiveness and increase program throughput. <p>2. Organizational and Operational Assessment of HCV Program</p> <ul style="list-style-type: none"> Conducted a top-to-bottom operational assessment of the HCV program to evaluate compliance, efficiency, staffing alignment, process flow, and policy implementation. Reviewed key program functions including intake, recertifications, inspections, customer service, file accuracy, and data reporting. Assessed software utilization, workload distribution, and customer experience touchpoints to identify barriers to program efficiency and performance. Benchmarked performance against HUD expectations, best practices from high-performing PHAs, and SEMAP indicators. Delivered a comprehensive assessment report with actionable recommendations for improving internal processes, staff training, quality control, system utilization, and performance metrics tracking. <p>Outcomes</p> <ul style="list-style-type: none"> Successfully assisted BCHA in completing hundreds of recertifications and move-ins within a condensed timeline, enabling the Authority to meet internal and HUD deadlines. Improved program efficiency and compliance through tailored support and high-quality file processing. Provided a clear, implementable roadmap for strengthening the overall administration of the HCV program, with recommendations tied directly to measurable outcomes (e.g., increased SEMAP scores, improved customer service, enhanced data integrity). Strengthened BCHA's internal capacity to manage program operations more effectively going forward.

3.2 Similar Past Projects

IEM has managed over \$19.3 billion in CDBG-DR funding for past and ongoing programs across the country. IEM staff and leadership have implemented programs throughout Florida, Louisiana, Oklahoma, Mississippi, New Jersey, New York, North Carolina, Puerto Rico, and Texas.

IEM has managed 15 CDBG-DR/MIT contracts for nine agencies, aiding communities across the country in their locally driven recovery efforts.

Since the inception of CDBG-DR, our team has led many major recovery programs. The team has supported CDBG-DR for over 30 years. We're implementers, policy architects, and trusted HUD technical assistance providers. We bring a wealth of knowledge, lessons learned, and best practices gained through decades of hands-on work and lived experiences—including leading hundreds of recovery programs nationwide. The following overview provides a snapshot of our experience delivering the full spectrum of recovery operations as detailed in the RFP, including our program management philosophy and ability to handle and protect sensitive information and data privacy.

Bringing our Expertise to the City of Fort Lauderdale

The IEM Team for the City of Fort Lauderdale is comprised of our best thought leaders and implementers. They are experienced in designing, leading, and delivering CDBG (including CDBG-DR) programs and bring their passion for housing recovery, infrastructure recovery, and economic development to the City.

IEM is a proven leader in federal grant administration with over 40 years of experience managing billions of dollars supporting housing, infrastructure, and economic recovery initiatives for at all levels of government (state, local, county, city). As a disaster recovery firm, IEM centers on rebuilding communities that have suffered devastating impacts from disasters causing significant damage to their housing, infrastructure, and economy. The table below provides some highlights of our projects and expertise in these areas.





Housing	Infrastructure	Economic Revitalization	Public Services
<ul style="list-style-type: none"> In New Jersey, the IEM Team assisted 97% (1,248 of 1,294) of the most delayed and difficult construction cases with completing construction and obtaining a Certificate of Occupancy to move back home. For Florida, IEM built a \$1.39 billion housing program helping 3,721 homeowners return to more resilient homes as we implemented Resilient Home Construction Standards. IEM completed nearly 2,000 homes for the Texas General Land Office's Homeowner Assistance Program—quicker than any other contractor. 	<ul style="list-style-type: none"> IEM is rebuilding infrastructure and housing for PRDOH through R3, the Non-Federal Match Program, and the CDBG-MIT Infrastructure Program. IEM worked closely with the NY State Hazard Mitigation Officer (SHMO) and the Governor's Office of Storm Recovery (GOSR) to creatively use Global Match for major infrastructure and resiliency projects. IEM's assistance with FEMA HMGP public-sector project work included \$1 billion for wastewater plan reconstruction and 	<ul style="list-style-type: none"> IEM is assisting PRDOH by promoting economic development with effective actions that guarantee the deployment of mitigation funds to the private sector through the Investment Portfolio for Growth for Disaster Recovery and Mitigation Programs. Under Jon Mabry's leadership of the Mississippi Disaster Recovery Division (DRD), more than \$5.4 billion in CDBG-DR funding for Hurricane Katrina recovery was administered, with 	<ul style="list-style-type: none"> IEM is assisting PR by providing legal services for Title Clearance, enabled nearly 500 homeowners to proceed with housing rehabilitation and reconstruction efforts.

Housing	Infrastructure	Economic Revitalization	Public Services
	<p>improvement in the two largest counties on Long Island.</p> <ul style="list-style-type: none"> • IEM Founder Madhu Beriwal served as a White House Advisor within the National Infrastructure Advisory Council (NIAC) to improve the security and resilience of the nation's critical infrastructure sectors. 	<p>nearly \$2.4 billion dedicated to economic recovery and infrastructure.</p>	

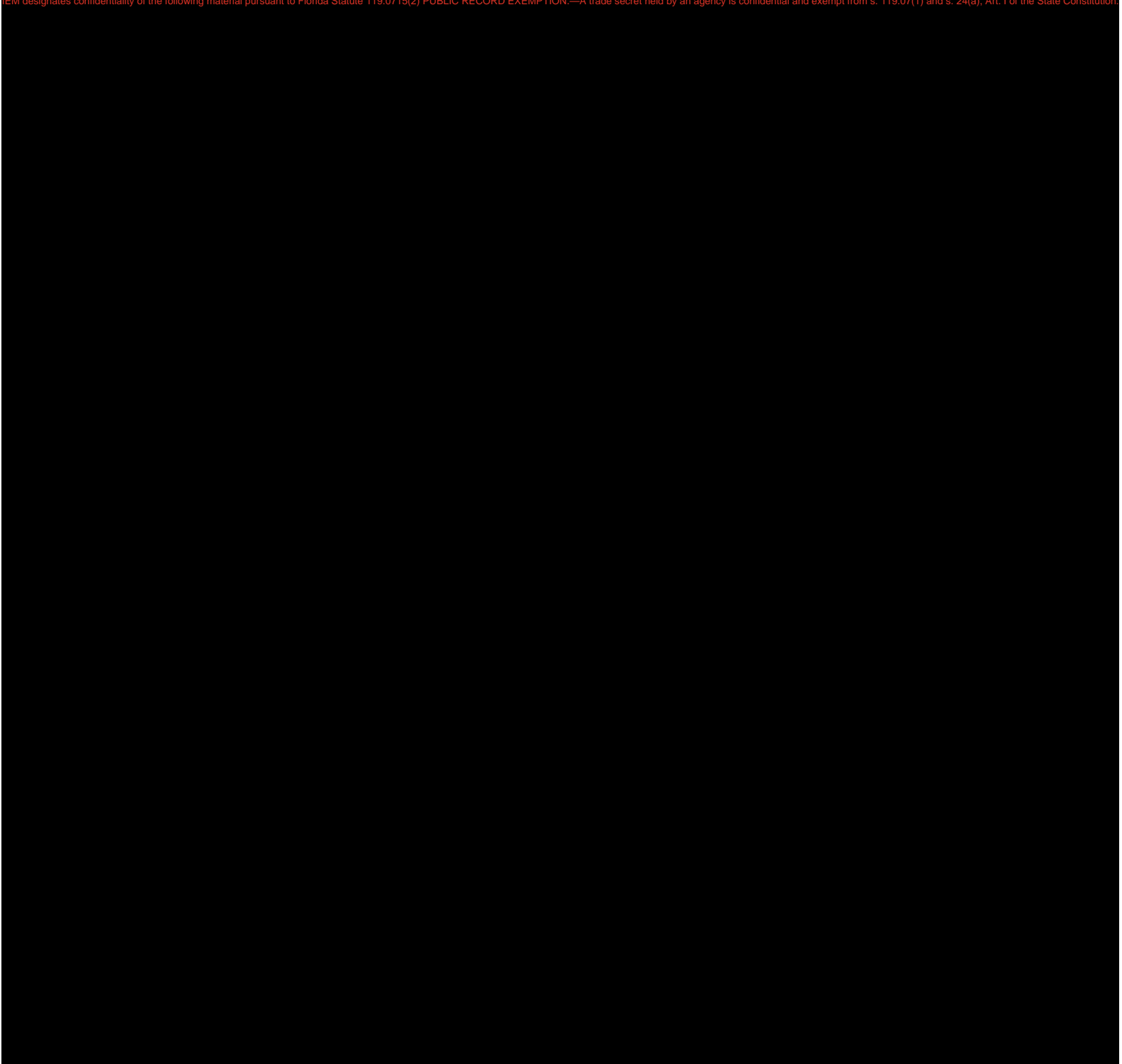
As demonstrated by our continued commitment to disaster-impacted communities over the last four decades, IEM brings the City of Fort Lauderdale a team of highly experienced experts ready to support the City throughout every stage of the recovery journey.

RESILIENCE IN ACTION: IEM'S TRACK RECORD OF RECOVERY AND RENEWAL

Across the United States, IEM has guided communities through recovery with precision, empathy, and speed. Our experience in administering large-scale recovery programs including CDBG-DR/MIT, Hazard Mitigation, Public Assistance, SBA, and other federal funding streams ensures that the City of Fort Lauderdale has the systems, staff, and unmatched expertise to deliver outcomes and build back stronger and more resilient than before. Our track record means Fort Lauderdale can rely on IEM to accelerate recovery and get recovery right from Day 1.

-  FEMA Funded Mitigation and Recovery Programs
-  CDBG-DR/MIT Programs
-  FEMA Funded Mitigation and Recovery Programs AND CDBG-DR/MIT Programs
-  Other Housing and Recovery Programs

IEM designates confidentiality of the following material pursuant to Florida Statute 119.0715(2) PUBLIC RECORD EXEMPTION.—A trade secret held by an agency is confidential and exempt from s. 119.07(1) and s. 24(a), Art. I of the State Constitution.



CDBG-DR MANAGEMENT EXPERIENCE

IEM designates confidentiality of the following material pursuant to Florida Statute 119.0715(2) PUBLIC RECORD EXEMPTION.—A trade secret held by an agency is confidential and exempt from s. 119.07(

3.3 Sustainable Business Practices

IEM is steadfast in its commitment to environmental responsibility, aspiring to be a leader in eco-conscious business practices. Our sustainable initiatives encompass a broad spectrum of efforts, including the reduction of energy consumption, waste minimization, and the utilization of eco-friendly materials. We have instituted comprehensive policies such as Waste Reduction and Recycling, alongside Idling and Emissions management, to ensure our operations are in alignment with our environmental objectives. Furthermore, IEM employs a LEED Green Associate to oversee our facilities' focus on environmental impact and resource efficiency. In our pursuit of continuous improvement, IEM is dedicated to developing and implementing a green initiative program by the end of 2025, establishing measurable goals to guide our future endeavors.

In addition, IEM collaborates with suppliers who share our conservation commitment, ensuring that our supply chain minimizes its carbon footprint to the greatest extent possible. We are committed to fostering a culture of conservation within our organization by encouraging employee engagement in environmental efforts through training and positive reinforcement. By integrating these practices, IEM aims to make a significant contribution to the preservation of our planet for future generations.

3.4 Business Structure and Other Company Information

IEM is pleased to provide our business structure and other company information as required by the RFP, in the table below.

Company Information	
Legal Name:	IEM International, Inc.
Business Structure:	Corporation (S Corporation)
Company Address:	5420 Wade Park Blvd Ste 140 Raleigh, NC 27607-4188
Phone Number:	(919) 990-8191
Fax Number:	(919) 237-7468
E-Mail Address:	contracts@iem.com
Website:	https://iem.com/
Technical Point of Contact:	Maria Badaracco, Contract Administrator (919) 990-8191 or contracts@iem.com
Contractual Point of Contact:	Tim Lagudi, Director of Citizen Services (917) 940-2707 or tim.lagudi@iem.com.
Relative Size of the Firm (including management, technical and support staff)	<ul style="list-style-type: none"> • Size of Firm (Total Employees): 897 • Executives: 8 • Directors: 27 • Managers: 58 • Supervisors: 127 • Professionals: 602

Company Information	
	<ul style="list-style-type: none"> • Clerical/Admin Support: 75
Registrations, Certifications, and Licenses	<ul style="list-style-type: none"> • WBE from the Women's Business Enterprise National Council (WBENC) • Active Status Page from Division of Corporations – Sunbiz.org

3.5 How IEM Exceeds the City's Minimum Qualifications

For more than 40 years, IEM has provided disaster recovery and emergency management services. We are committed to helping clients prepare for, respond to, recover from, and mitigate disasters. IEM has directly managed local and state-wide grant programs, while maintaining decades-long relationships with the U.S. Department of Treasury, HUD, FEMA, and other federal agencies. IEM has supported federal agencies, states, counties, and cities as they prepare for, respond to, and recover from the worst disasters in U.S. history. The table below provides a breakdown of how IEM not only meets but exceeds the City of Fort Lauderdale's minimum qualifications for this contract.

Minimum Qualification Requirement	How IEM Exceeds the Requirement	Proposal Section	
Proposers shall be in the business of developing and implementing CDBG-Disaster Recovery programs.	Since 2005, our experts have been on the ground assisting state, city, and county governments with the management and planning of multi-scale CDBG-DR grants management deliveries in Florida, Mississippi, New York, New Jersey, Louisiana, Texas, North Carolina, and Puerto Rico. Through our work, we have worked with countless cities and counties.	See Section 3.0 Experience of the Firm and Key Personnel Experience and Section 5.0 References & Past Performances for more information on how IEM exceeds this requirement.	✓
Proposers shall be in the business of developing and implementing CDBG-Disaster Recovery programs and must possess sufficient financial support, equipment, and organization to ensure that it can satisfactorily perform the services if awarded a Contract.	In submitting this proposal, IEM certifies that we have sufficient financial support, equipment, and organization to ensure that we can satisfactorily perform the requested services.	See Section 4.3 IEM's Current Workload, sub section Facilities, Technological Capabilities, and Other Resources for more information on how IEM exceeds this requirement.	✓
Proposers must demonstrate that they, or the key staff assigned to the project, have successfully provided services with of similar magnitude to those specified in the scope of services to at least one entity similar in size and complexity to the City of Fort Lauderdale or can demonstrate they have the experience with large scale private sector clients and the managerial and financial ability to successfully perform the work.	IEM offers a team of highly skilled CDBG-DR staff members who were meticulously chosen based on their extensive expertise in disaster recovery, in-depth understanding of community needs, and comprehensive knowledge of CDBG-DR programs. They all have experience in similar size and complexity to the City's CDBG-DR program.	See Section 2.1 Key Personnel Experience for more information on how IEM exceeds this requirement.	✓
Proposer or principals shall have relevant experience in developing and implementing CDBG-Disaster Recovery programs. Project Manager assigned to	IEM's staff, leadership, SMEs, and principals have assisted in developing and implementing CDBG-DR programs throughout Florida, Louisiana, Oklahoma,	See Section 2.1 Key Personnel Experience for more information on how	✓

Minimum Qualification Requirement	How IEM Exceeds the Requirement	Proposal Section
the work must have at least five (5) years of experience in developing and implementing CDBG-Disaster Recovery programs and have served as project lead on similar projects.	Mississippi, New Jersey, New York, North Carolina, Puerto Rico, and Texas. Our proposed manager Nadienka Sanz has over seven years of CDBG-DR experience, including the Rebuild Florida Program and Puerto Rico R3 Program.	IEM exceeds this requirement.
Before awarding a contract, the City reserves the right to request that a Proposer submit such evidence of qualifications as the City may deem necessary. Further, the City may consider any evidence of the financial, technical, and other qualifications and abilities of a firm or principals, including previous experiences of same with the City and performance evaluation for services, in making the award in the best interest of the City.	Our proposal has been submitted by Keith Reynolds, Director, Contract Operations and Compliance, who is an authorized representative of IEM and is authorized to contractually bind the business entity. We provide a corporate resolution of Mr. Reynolds in Appendix A: Evidence of Corporate Resolution evidencing that the individual submitting the proposal, does in fact have the required authority stated herein.	See Section 2.0 Executive Summary for more information on how IEM exceeds this requirement. ✓
Firm or principals shall have no record of judgments, pending lawsuits against the City or criminal activities involving moral turpitude and not have any conflicts of interest that have not been waived by the City Commission.	In submitting this proposal, IEM certifies that our company and/or principals do not have a record of judgments, pending lawsuits against the City or criminal activities involving moral turpitude and not have any conflicts of interest that have not been waived by the City Commission.	Upon the City's request, we can provide additional information. ✓
Neither firm nor any principal, officer, or stockholder shall be in arrears or in default of any debt or contract involving the City, (as a party to a contract, or otherwise); nor have failed to perform faithfully on any previous contract with the City.	In submitting this proposal, IEM certifies that our company, principals, officers, and/or stockholders are not in arrears or in default of any debt or contract involving the City (as a party to a contract, or otherwise); nor have failed to perform faithfully on any previous contract with the City.	Upon the City's request, we can provide additional information. ✓

4.0 Approach to Scope and Adherence to Timeline

Understanding the City's Needs, Goals and Objectives

The City of Fort Lauderdale is recovering from one of the worst flooding events in its history. In April 2023, a “historic flash flood” dropped 25.6 inches of rain in just 12 hours, inundating neighborhoods and causing an estimated

City of Fort Lauderdale Goals

- ✓ Full Compliance and Transparency
- ✓ Action Plan and Program Alignment with Local Priorities
- ✓ Robust Community Engagement
- ✓ Unmet Needs Assessment
- ✓ Seamless Program Execution
- ✓ Timely Expenditure of Funding

\$1.1 billion in damages. Two weak tornadoes also hit Broward County, one just west of Hollywood and another south of the Fort Lauderdale airport. The City's own damage assessment found that approximately 700 structures suffered major damage and 400 received minor damage. Even public services were strained, as first responders rescued residents from rapidly rising waters.

In response, the U.S. Department of Housing and Urban Development (HUD) has allocated \$88.05 million in CDBG-DR funds to Fort Lauderdale to support long-term recovery from the April 2023 storms. This unprecedented funding presents a critical opportunity for the City to not only rebuild what was

lost, but to invest in a stronger, more resilient future for all its residents. We understand the City's goals of rapid and compliant recovery, community resiliency, and accountability for these federal funds. The City needs a partner to not only administer the CDBG-DR grant but also to ensure that recovery funds are used strategically to build a stronger, more resilient Fort Lauderdale. Key City objectives include:

City Needs and Objectives	Aligning our Approach
Recovering Quickly and Efficiently: Residents and businesses are eager to see recovery projects move forward without delay. HUD has strict timelines for CDBG-DR funds, and the City expects to meet or beat those deadlines.	Our approach reflects a sense of urgency – we will compress timelines where possible (for example, by preparing draft Action Plan components, even as public input is underway) to accelerate HUD approvals and project start dates. We will utilize our prior HUD experience to avoid common bottlenecks, ensuring the City's recovery is swift.
Ensuring Full Compliance and Accountability: Fort Lauderdale must remain compliant with all federal requirements to secure and retain \$88M in funding. The City's goals include zero audit findings and full documentation of how funds are used.	Our approach includes robust internal controls, frequent file audits, and compliance checkpoints at each phase of the project. We will ensure every decision and expenditure is properly recorded and ready for HUD review. This aligns with the Comprehensive Plan's governance policies and the City Commission's emphasis on fiscal responsibility. Compliance is not just a box-checking exercise, but as a core project component – this mindset will protect the City and build public trust through transparency.
Maximizing Community Benefits: We understand Fort Lauderdale's vision of a resilient and thriving community. The City Commission's FY 2025 priorities, the City's Fast Forward Fort Lauderdale 2035 Vision, and your 2040 Comprehensive Plan emphasize sustainability, housing affordability, and preparedness for climate impacts.	Our approach for recovery is crafted to deliver on these local goals. Fort Lauderdale's FY 2025 Affordable Housing and Economic Development priority focuses on providing affordable and attainable housing types for a variety of incomes across the citywide and leveraging innovative tools like land trusts. Housing programs can be designed to not only replace what was lost in the disaster but also to expand and improve the resiliency of long-term affordable housing stock where possible. The City's Infrastructure and Resilience priority includes addressing flooding and upgrading infrastructure. We will help you prioritize recovery projects in your CIP and Comprehensive Plan to maximize local investment and fill funding gaps to quickly advance infrastructure projects such as stormwater system improvements and resilient repairs to public facilities – investments that reduce future risk and improve resilience to intense storms.

We also acknowledge the need to reach vulnerable populations - including low- and moderate-income households, seniors, and other vulnerable populations - as required by HUD. Our needs assessment will map social vulnerabilities to ensure fairness in project selection, echoing your Comprehensive Plan's call for inclusive resiliency planning and the City's Public Spaces and Community Initiatives priority - which supports neighborhood improvements and quality of life citywide.

4.1 Overall Approach to Accomplishing the Project

The IEM Team offers the City of Fort Lauderdale a turnkey solution: **a phased, outcome-driven recovery program that not only fulfills HUD requirements but also advances the City's 2040 vision of a resilient, vibrant community**, and over 40 years of experience at the forefront of disaster management helping governments prepare for, respond to, and recover from the worst disasters in modern U.S. history.

We will support you every step of the way.

IEM's approach to disaster recovery services begins with the end outcomes in mind, ensuring the City's goals and stakeholder input are systematically integrated. In partnership with Fort Lauderdale, IEM will execute a comprehensive, five-phase approach to rapidly initiate your CDBG-DR program, develop a HUD-approved Action Plan aligned with the City's priorities, design impactful recovery programs, implement them with speed and precision, and ensure a smooth closeout. Since our team has **many years' experience serving Florida** at the state and local levels, we can readily infuse the City's needs and commission priorities into our programs. We will employ an aggressive approach and workplan to quickly demonstrate results.

IEM's project manager will conduct a kick-off meeting following contract execution with the City to review goals, priorities, and outcomes for disaster management. We know the importance of clearly and consistently defining success, goals, priorities, and timeline. After the initial kick-off meeting, we will refine our assumptions and approach and provide a final workplan and schedule. The schedule will allot time to incorporate any revisions or changes requested by the City. **Regular meetings and reporting will assess progress, identify and manage risks, ensure close coordination, and enhance internal and external team communications.** We measure and control all critical aspects of the project's progress, while establishing key performance indicators to keep you informed and allow our team to address any issues or challenges proactively.

IEM's Approach to Grants Management for the City



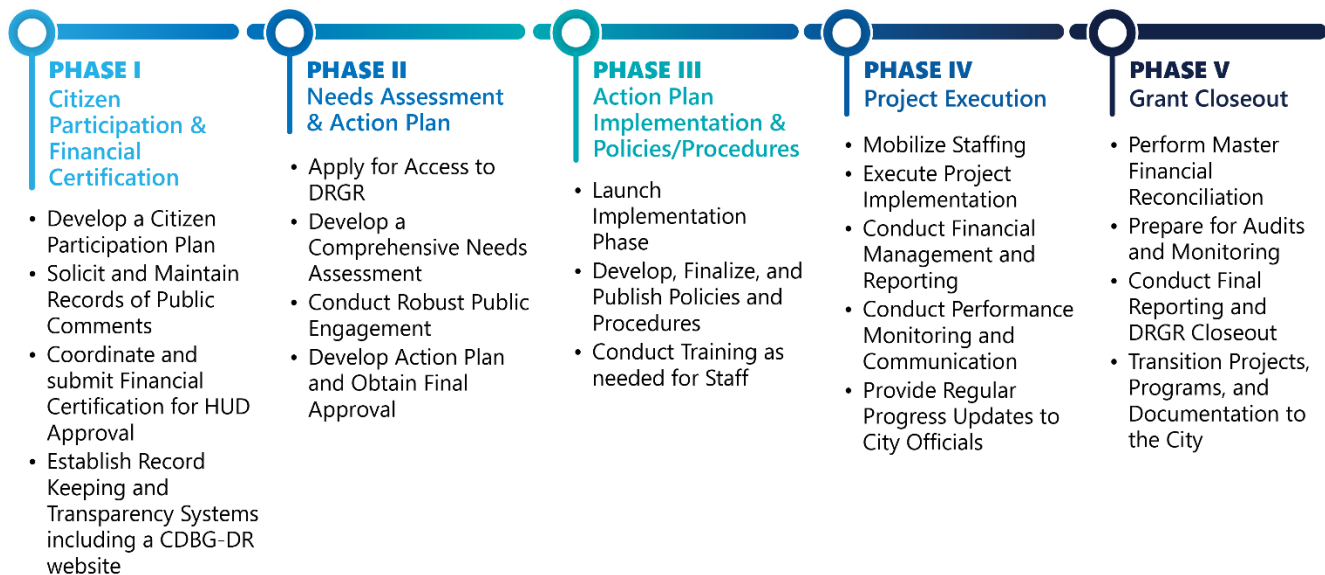
Our approach is inspirational and neighbor-centric – we know that behind every project and dollar are real people and neighborhoods counting on recovery.

From day one, we will work side-by-side with City staff as one integrated team, transferring our energy and expertise to “build back better” in the spirit of the City’s “We Are Ready” vision of resilience. We do not simply react to problems; we proactively seek solutions based on desired outcomes and anticipate and mitigate obstacles to meet our clients’ needs. We also understand the urgency: your timeline for launching this \$88M recovery is aggressive. We will meet and beat those deadlines by applying proven project management practices and an agile mindset.

Our approach combines a thorough understanding of Fort Lauderdale’s needs with time-tested methodologies and a passionate team, ready to help the City accomplish this project. We will support you in building a transparent, accountable, and equitable CDBG-DR program that directly addresses the City’s priorities – from modernized drainage to affordable homes – and meets every federal requirement along the way. Our proposal is more than promises: It’s a reflection of our genuine commitment to Fort Lauderdale’s vision. We will work tirelessly to help the City turn this \$88 million opportunity into a transformative recovery that not only repairs the damage from yesterday’s floods but also lays the groundwork for a stronger, more resilient tomorrow.

Together, we’ve got this. Fort Lauderdale’s future is bright, and the IEM Team is ready to help you achieve it.

The City has outlined five primary phases within this contract. A detailed description of IEM’s plan of action to perform each phase effectively and in a timely manner is detailed in the following sections. A brief overview of expected deliverables for each phase is also provided in the table below. Our team will coordinate closely with the Housing and Community Development Division throughout the recovery process and provide regular updates at a cadence requested by the City. We will ensure the Action Plan and CDBG-DR Programs are informed by robust community engagement.



4.1.1 Phase I

Objective: Establish a strong foundation for the CDBG-DR program through robust citizen participation planning and financial readiness. Our shared goal is to engage the public from the outset and secure HUD's financial management certification, setting the stage for an inclusive and compliant recovery process.

Strategy & Vision: Engage and Build Trust. We recognize that transparent community engagement and sound financial governance are the cornerstones of a successful recovery. In line with Fort Lauderdale's commitment to public outreach on resilience issues (Advance Fort Lauderdale 2040 Comprehensive Plan Policy CC 3.1.2 encourages community participation in climate mitigation programs), our strategy centers on giving citizens a voice in the recovery process and assuring them that funds will be managed responsibly. We will work closely with City leadership to integrate this CDBG-DR effort into ongoing communication channels – reinforcing the City's reputation for accountability and aligning with the newly funded Resilience Outreach Coordinator role that underscores the City's emphasis on community resilience outreach. We will also ensure that the City is positioned for success with proficient financial and grant management systems, and the capacity to execute large-scale CDBG-DR programs. **By the end of Phase I, the community will be informed and involved, and the City will have HUD's approval of our financial management capacity, providing full confidence to move forward.**

Methodology

Develop A Citizen Participation Plan (CPP): Our core objective is to ensure that programs address the greatest unmet need in Fort Lauderdale, while building trust along the way. **Our approach will be compliant, transparent, coordinated, and community driven.** Within two weeks, IEM will develop a comprehensive Citizen Participation Plan in close coordination with the City. It will be the blueprint for the City's public engagement strategy and complement existing public engagement efforts the City has recently undertaken as part of the disaster recovery and consolidated plan process. According to the Community Investment Plan, the share of adults over the age of 65 was 17.8% in 2020, exceeding the national average. **The CPP will methodically consider the City's diverse needs and audiences, ensuring reach to the City's most vulnerable populations,** including older adults. This includes compliance with the Fair Housing Act and reducing barriers to access, in order to maximize participation and ensure the perspectives of the most vulnerable populations are captured in the public engagement process.

IEM was the recipient of the Sach's Media Group 2019 Dick Pope All Florida Golden Image Award for the Rebuild Florida outreach campaign, which allowed Florida residents including in Fort Lauderdale to learn about and benefit from recovery resources.

In accordance with the Universal Notice and new HUD Action Plan templates, the Citizen Participation plan will clearly outline the following:

- Holding required public hearings, which will provide an overview of CDBG-DR, the Action Plan, and the subsequent recovery process. The hearings will feature testimony from local officials or community leaders, and an interactive open floor Q&A session. They will be held in accessible locations, with accommodation for persons with disabilities, including the provision of auxiliary aids or services. Translation services will also be provided. Further details on the execution of public hearings can be found in Phase II.
- Notifying affected residents of the public hearing(s) through the dedicated disaster recovery website, electronic mailings, press releases, statements by public officials, media advertisements, social media, and public service announcements. All materials will be simple and in plain language. We will also leverage trusted networks of neighborhood organizations to expand public awareness.
- Providing at least 30 days for public comment with varied methods for submission of comments and keep a thorough record. This will include a dedicated email for public comment submissions.

- Launching a multimodal community survey to capture broad and structured input from residents on outstanding recovery needs. The survey will be distributed through various methods including online. We will also encourage verbal and written comments during public hearings.
- Considering and thoughtfully responding to all public comments and amend the Action Plan as needed. Any substantial amendment will require additional public outreach and at least 30 days for public comment.

The City must consult with the state and other surrounding stakeholders to ensure consistency with regional plans, and with agencies that manage local PHAs, CoCs, and HUD-approved counseling agencies. It is also encouraged to consult with other relevant federal government partners, state, and local emergency management agencies that have primary responsibility for the administration of FEMA funds, as well as non-governmental organizations and leaders supporting community recovery. We will establish a clear timeline for receiving feedback and create a consistent process for how feedback will be received from these stakeholders. IEM will work with the City to develop a list and engagement strategy of all appropriate stakeholders. If the City opts to set up a citizen advisory council (now *recommended* by HUD but not *required*), IEM will work with the City to support robust engagement and participation.

Establish Record Keeping and Transparency Systems: We will set up a secure, efficient record management system to store all CDBG-DR related documents (applications, environmental reviews, contracts, invoices). This system will be both secure and accessible to authorized City staff, allowing for real-time collaboration and oversight. IEM will also develop a dedicated CDBG-DR webpage, where the Action Plan will be posted for a public comment period of at least 30 days. The CDBG-DR webpage will be a one-stop hub for all CDBG-DR program information. This page will be regularly updated with announcements (meeting schedules, draft documents), informational content (an FAQ about the CDBG-DR program, fact sheets, progress updates), and tools for engagement (the online survey link, a public comment submission form, contact information). This ensures transparency and keeps the community informed of program milestones and opportunities to participate. All website content will be reviewed and approved by the City before being uploaded.

Coordinate Financial Management and Grant Compliance Certification: Compliance begins with a firm understanding of how regulations are applied to adequately achieve program success. Our compliance subject matter experts have provided support for every major CDBG-DR delivery in the nation, with audit-ready financial records. IEM has developed a robust system of preventative, detective, and mitigating controls to proactively identify and address issues before they escalate. This includes frequent training for City staff and subrecipients.

CDBG-DR HUD Financial Management and Grant Compliance Checklist

- ✓ Proficient financial management controls
- ✓ Proficient procurement processes
- ✓ Procedures to detect and prevent fraud, waste, and abuse of funds
- ✓ Processes to avoid duplication of benefits
- ✓ Capacity to ensure timely administration of funds

IEM will work closely with the City's Finance Department to complete the financial management and grant compliance certification checklist based on current HUD guidance. We will facilitate a thorough internal review of financial systems, policies, and staffing. Any gaps identified will be quickly addressed with technical assistance or interim measures, so the City can confidently submit the certification package to HUD for review and approval. Our team will review the checklist prior to submission to HUD, guarantee compliance, and position the City for success throughout the disaster recovery process.

Deliverables. IEM will develop a Citizen Participation Plan, solicit and maintain records of public comments, coordinate and submit the Financial Certification and Grant Compliance Checklist for HUD approval, and establish record keeping and transparency systems, including a dedicated CDBG-DR website. Concurrently, we will ensure the City requests and receives DRGR access from HUD to begin entering activities in the DRGR system as soon as

possible. This step can be initiated before submission of the Action Plan. DRGR approval is further detailed in Phase II.

4.1.2 Phase II

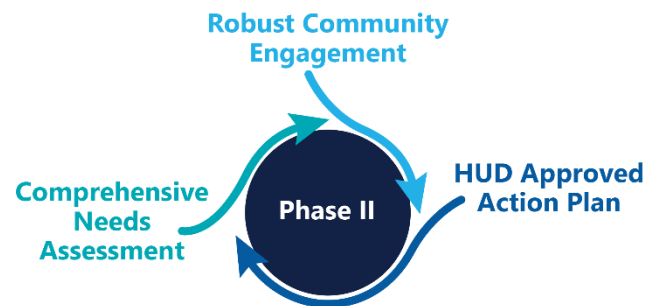
Objective. Conduct a comprehensive needs assessment to identify disaster recovery needs across the City. Our shared goal is to inform a HUD-compliant Action Plan that prioritizes projects and programs to address the stated needs. This phase aims to produce an actionable roadmap - activating the City's CDBG-DR Action Plan - that reflects community input, data-driven analytics, and strategic alignment with the resilience and equity goals of the RFP. Our team includes the architects of the most significant update to CDBG-DR policy in decades: HUD's inaugural Universal Notice. We will apply our deeper understanding of its policy to ensure consistency with current guidelines and ready your action plan for swift HUD approval.

Strategy & Vision: A Plan for Recovery and Resilience. Our vision involves developing an Action Plan that not only meets HUD's requirements, but also serves as a blueprint for a more resilient, safe, and secure Fort Lauderdale. We will employ a data-driven and collaborative planning approach. **This means combining hard data -- such as damage assessments, social vulnerability indices, and infrastructure studies -- with broad community engagement, to ensure the plan addresses pressing needs on the ground.** We align this effort with the City's long-term plans. For example, the City's Comprehensive Plan, Strategic Plan, and Vision Plan all call for resilient infrastructure upgrades or improved affordable housing; we will incorporate such initiatives into the CDBG-DR plan where eligible. Fort Lauderdale's Commission has prioritized critical infrastructure, including stormwater improvements in eight neighborhoods, and resilience investments; our Action Plan will coordinate with these efforts to maximize synergy and impact for the City, its residents and stakeholders and preserves precious CDBG-DR dollars for projects not fundable by other programs

Throughout Phase II, IEM will "leave no stone unturned" for the City. Every eligible recovery need will be identified, every stakeholder will have a chance to be heard, and every decision will be made in a manner that balances community vision and needs with requirements, to maintain strict compliance with HUD guidelines.

Methodology: Comprehensive Needs Assessment: The IEM Team will perform a thorough unmet needs assessment of housing, infrastructure, economic recovery, public service, and mitigation needs resulting from the disaster. We will gather and analyze data from multiple sources: damage reports from City departments, FEMA and SBA data on individual and public assistance, insurance claim data, and input from non-profits and community organizations, ensuring we capture all impacts for calculation and avoid any duplication of benefits in our analysis. Our needs assessment will include designing and deploying a **community survey** to collect direct input from affected residents on their outstanding recovery needs. Prior to release, we will obtain approval of the survey from the City's Structural Innovation Division, to ensure it aligns with citywide data standards. The result will be a detailed quantification and prioritization of needs that focuses on LMI households and areas, per HUD's requirement that at least 70% of funds benefit LMI populations. This data-driven process guarantees that all eligible projects and costs are identified and supported by evidence, so no community need is overlooked.

Robust Public Engagement: We will implement an inclusive public engagement program that exceeds HUD requirements. Building on the Phase I CPP, we will host at least three public meetings and two public hearings before the City Commission. These forums will be strategically scheduled and geographically distributed to maximize attendance from all neighborhoods, especially those areas determined to be most impacted. We will present the findings of the needs assessment and proposed recovery strategies, then actively solicit public feedback and project



ideas. All public comments will be recorded and considered - as required by the CPP. **By facilitating these dialogues, we provide opportunity for residents to help shape the City's recovery – a fully integrated approach that echoes Fort Lauderdale's emphasis on education, outreach, and coordination in resilience planning.** Our staff - including bilingual facilitators, as needed - will be on hand to ensure both local and federal perspectives are addressed – for example, explaining HUD rules to the public and conveying community priorities back to program design. These meetings, hearings, and our approach will fully satisfy HUD's public participation requirements (including those outlined in the Universal Notice and otherwise captured in 24 CFR 91.115) to help build consensus around the Action Plan.

Action Plan Development and Gaining HUD Approval: Guided by the needs data and community input, we will develop the CDBG-DR Action Plan, which will detail the proposed allocation of funds to programs and projects (housing rehab, infrastructure projects, economic revitalization, planning costs, and more, along with each program's description, budget, and eligibility criteria). **We will ensure the Action Plan clearly ties each proposed recovery activity to the documented unmet needs – creating a logical, evidence-based narrative that HUD reviewers expect.** Critical compliance elements will be built in:

1. Meet or exceed the 70% LMI benefit threshold.
2. Comply with Public Law 118-158 and HUD's Federal Register Notice (we will cross-check the plan against every requirement in the Universal Notice).
3. Incorporate applicable mitigation measures for future resilience as encouraged by HUD.

Our team will align the Action Plan with the City's 2040 Comprehensive Plan goals – including resilient infrastructure, affordable housing, and climate adaptation strategies, and reference the City's FY 2025 Adopted Commission Priorities -- such as leveraging planned stormwater projects or expanding internet access in low-income neighborhoods -- if those overlap with recovery needs. This demonstrates to HUD and the community that Fort Lauderdale's recovery is forward-looking and unified with its long-term vision. While ensuring these goals are reflected in your plan, we will also work with City to balance the narrative to ensure compliance with current regulations to ensure quick approval so programs may begin on time without further plan revision. This demonstrates to HUD that we will operate within the confines of established federal guidelines.

Once the draft Action Plan is reviewed and approved internally -- with City management and Commission input -- we will submit it to HUD via the DRGR system for official approval. We will manage the submission process meticulously, uploading all required components and working with the City to quickly respond to any HUD feedback. **Our ultimate goal is to secure HUD approval on the first submission by delivering a high-quality Action Plan that meets all federal criteria and local objectives.** Upon HUD approval, we will coordinate an official City Commission adoption and publication of the Action Plan, including a hard copy delivered to the Housing and Community Development office and posting on the City's website to kick off Phase III. This Action Plan will serve as the official blueprint for Phase III and beyond, including program design, development of policies and procedures, implementation, management, and closeout of the City's programs.

Deliverables. IEM will work with the City to conduct a dynamic community engagement campaign. We will integrate community input to develop a thorough Needs Assessment and HUD-compliant CDBG-DR Action Plan.

4.1.3 Phase III

Objective. Translate the Action Plan into an operational recovery program. This involves developing detailed policies and procedures for all CDBG-DR funded programs/activities, obtaining necessary approvals for these procedures, and setting up the frameworks required to launch project implementation. The objective is to ensure that every aspect of program delivery is clearly defined, compliant, and ready for execution.

Strategy & Vision: Develop Program Infrastructure. In Phase III, our focus is on establishing a strong governance and implementation structure that will guide the day-to-day execution of recovery projects. We understand that

well-crafted policies and procedures are essential for consistency, fairness, and transparency – they comprise the rulebook that staff and partners will follow. As IEM and the City develop program policies and procedures, we will draw upon best practices from our multi-decade involvement in the largest and most successful CDBG-DR programs, as well as Marion McFadden’s knowledge from working with more than 200 CDBG-DR grantees across the nation. **By the end of Phase III, Fort Lauderdale will have a “shovel-ready” CDBG-DR program: initial policies and procedures in place compliant with regulations and every role defined – so Phase IV can proceed without delay or confusion.**

Methodology:

Finalize Action Plan and Launch Implementation Phase: Once HUD approves the Action Plan (Phase II), we will officially transition to implementation. Our first step is to ensure the Action Plan is disseminated and understood by all stakeholders. We will present the approved Action Plan to City staff in the Housing and Community Development Division and other relevant departments and publish it on the City’s CDBG-DR webpage for public access. This kickoff meeting will outline the programs to be launched, timelines, and responsibilities. While largely procedural, this marks the handoff from planning to action. We treat this milestone seriously: confirming that everyone is aligned on the what and why of the recovery programs before we define the how.

Develop Detailed Policies and Procedures (P&P): Our experienced team of SMEs will work with the City to develop a detailed policies and procedures framework while the Action Plan goes through the approval process at HUD. We will effectively tailor our existing library of policies and procedures to meet Fort Lauderdale’s needs and be ready for final refinements immediately after HUD approval. **This framework will serve as the operational backbone of the CDBG-DR program – ensuring consistency, preventing errors, and guiding new staff or contractors in executing programs properly.**

Once the City’s key priorities have been outlined, our team will use the sequence depicted in the figure below to develop successive documents, each developed in close coordination with the City.



Program Design Framework

For each program/activity identified in the Action Plan (e.g. homeowner rehabilitation grant program, infrastructure repair and mitigation projects, economic revitalization grants), our team will develop a comprehensive Policies and Procedures manual. These P&P documents will clearly delineate eligibility criteria, application processes, selection criteria, compliance requirements, and roles and responsibilities for implementation. We will incorporate all relevant federal, state, and local requirements. This means embedding cross-cutting federal regulations into the procedures from the start – for instance, construction projects will have P&P sections on Davis-Bacon labor standards, Section 3 hiring, the Uniform Relocation Act, and environmental review procedures (24 CFR Part 58), to ensure these cross-cutting regulations are addressed correctly. Likewise, our procurement-related procedures will include all required contract clauses and provisions mandated by 2 CFR 200, so that any contracts or subrecipient agreements executed in Phase IV are compliant. We pay special attention to eligibility criteria and benefit calculations for programs serving beneficiaries, to ensure they are clearly defined and in line with HUD rules and the City’s priorities.

Collaborative Review and Approval of Policies and Procedures: IEM will work closely with the City’s key agencies in the development of the policies and procedures, and submit to the City’s Housing and Community Development, Risk Management, and Legal Offices for review and approval. We will facilitate review workshops when each department can provide input: Housing/CDBG staff will verify the procedures align with community needs and HUD

rules, Risk Management will identify and mitigate any procedural risks (e.g., insurance requirements for contractors), and the City Attorney's designees will ensure legal sufficiency. This cross-functional review not only yields stronger procedures but also builds City staff capacity; they become intimately familiar with the program rules through this process. We will revise P&Ps based on feedback and obtain formal approval from the City (and HUD, if required for certain policies). The end product will be a set of clearly-defined City-approved policies and procedures governing every aspect of the CDBG-DR programs. Additionally, we will ensure that all program documents and templates (applications, checklists, contracts) are developed or updated to conform to these procedures. For example, if the P&P requires a Duplication of Benefits check, we will create the form and spreadsheet for that; if it requires certain contract language, we will update the City's contract templates to include those HUD provisions. Nothing is left to chance: For each rule in the P&P, as needed, there will be a corresponding tool or document to implement it.

Publish and Communicate Policies and Procedures: Once finalized, we will publish the policies and procedures on the City's CDBG-DR webpage, making them accessible to the public, community partners, and all implementation personnel. By doing so, we fulfill both HUD's transparency expectations and the City's commitment to open government.

IEM always ensures that training is a part of our delivery of CDBG-DR grant administration. Our experiences have found that investment in training significantly contributes to a smooth and compliant program execution. Our team will emphasize knowledge transfer and train the City's personnel on the nuances of HUD regulations, compliance, project management, and build local capacity to manage the entire CDBG-DR recovery grant. We will conduct training sessions for City staff and any key partners on the new procedures. This may include workshops for City project managers on how to document files for audit, or briefings for elected officials so they can respond to constituent questions about program rules. Our approach ensures that everyone -- from a homeowner applicant to a city engineer managing a construction project -- knows the rules of the game up front. Clear communication of the P&P at this stage will minimize confusion or errors during execution.

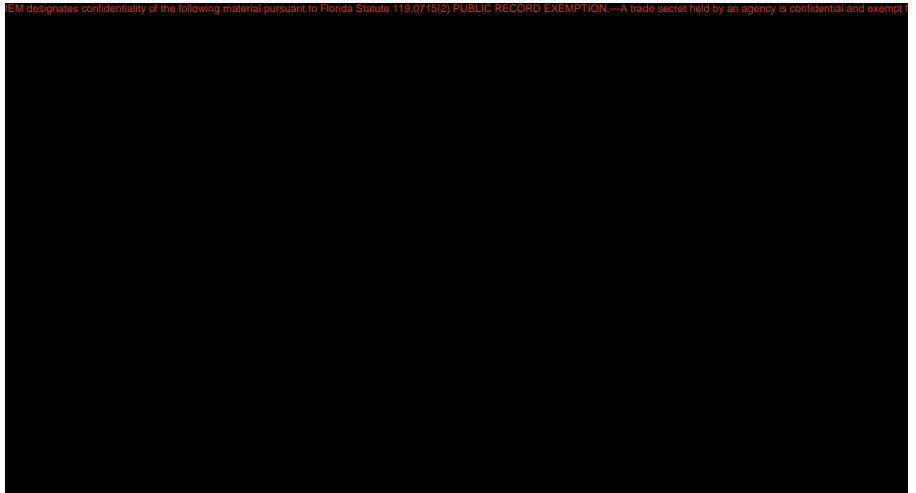
Deliverables. IEM will present the Action Plan to City staff and develop detailed policies and procedures in close coordination with the Housing and Community Development, Risk Management, and Legal Offices. Once finalized, the policies and procedures will be published on the CDBG-DR webpage, and trainings will be provided for City staff, as needed.

4.1.4 Phase IV

Objective. Coordinate Fort Lauderdale's recovery to implement the project and programs in its Action Plan efficiently, effectively and with full regulatory compliance. This phase's goal is to deliver promised recovery outcomes to the community, promptly, within budget, while honoring the city commission's priorities.

Strategy & Vision: *Execute with Excellence and Accountability.* Phase IV is where plans turn into tangible results for Fort Lauderdale's residents. Our strategy is to apply strong project management and financial control practices to each activity, treating each funded project as a sub-component of the overall program with clear scopes, schedules, and performance metrics. We will not merely restore the status quo; we want to rebuild better, streamlining processes and leveraging existing projects to solve problems. We will apply strong project management and financial controls, using clear scopes, schedules and performance metrics. Quality and compliance are part of every step: Getting it right the first time gains trust and satisfies audits.

HUD requires that at least 70% of the CDBG-DR funds benefit low-and-moderate income individuals. Our effectiveness in satisfying that requirement was demonstrated previously in Florida – where we served 92% of LMI households – as well as in Texas, where we served 80% of LMI households. Through stakeholder engagement and support in the most vulnerable neighborhoods, IEM raised awareness of program features and established the trust critical to participation. Vulnerable Fort Lauderdale populations impacted by the 2023 flood are depicted in the map to the right.



Methodology. Program Mobilization and Staffing: In Phase IV, we will stand up the full implementation team: experienced project managers, grant management specialists and compliance officers. We will onboard any sub-consultants or technical experts required, such as licensed engineers, architects, or environmental specialists to design and oversee construction projects. The team will be trained on policies, procedures and HUD’s requirements.

Project management tools will track each activity. If procurements are needed, we will initiate those per 2 CFR 200 and City procurement rules. RFPs/RFQs will include required federal language and provisions. Every contract will require verification to ensure that it meets HUD requirements. By mobilizing resources and setting up contracts correctly, we pave the way for smooth project implementation.

Project/Program Implementation: The IEM Team will execute recovery projects per the Action Plan. For infrastructure projects, that means managing the project lifecycle: finalizing scopes of work, coordinating engineering designs, securing permits, overseeing contractors and keeping projects on schedule. We will coordinate City departments for technical reviews and leverage its project management protocols. For housing and community development programs, we will launch application intake, conduct eligibility reviews, and provide case management to guide beneficiaries. All activities will strictly adhere to established P&P and HUD rules.

Compliance monitoring will be continuous, enforcing Davis-Bacon prevailing wage compliance on the job sites (collecting certified payrolls, conducting worker interviews) and verifying income eligibility and no duplication of benefits for housing program applicants. We will maintain meticulous records for each project/beneficiary in the centralized system established in Phase I. This ensures that every dollar spent is supported by documentation proving it is allowable, eligible, and properly procured. Additionally, we implement risk management practices, identifying potential obstacles (like environmental challenges or construction delays) early and addressing them proactively through contingency plans or technical guidance. Our approach treats compliance as part of daily operations, not a separate exercise, thereby embedding quality control in the fabric of execution.

Coordination and Approvals: Recovery projects often require coordination with external agencies and regulatory compliance. Our team will work with all local, state, and federal authorities to obtain permits, waivers, and special approvals. For instance, if a project impacts a wetland, we coordinate with environmental regulators; if we need a HUD waiver for a specific requirement, we draft the request and justify it; if state historic preservation office (SHPO) consultation is needed for renovations in historic districts, we coordinate that process. Our knowledge of HUD’s alternative requirements and waivers will guide the city in seeking flexibility to the projects’ greatest benefit.

To ensure no Duplication of Benefits (DOB) at the time of assistance, we will cross-check against FEMA, insurance, and other sources to confirm CDBG-DR is the payer of last resort. Active communication with FEMA, the State, and Broward County will share data throughout implementation. Furthermore, regular coordination meetings with City

departments will align efforts and resolve issues. This integrated approach expedites project delivery and helps navigate bureaucracy by ensuring everyone has consistent project updates.

Financial Management and Reporting: Financial stewardship is a top priority in Phase IV. We will track budgets at both the project and grant levels, to ensure funds are used efficiently and according to the Action Plan allocations. Each month, our team will perform reconciliations with the City's finance team, matching expenditures to budget and verifying all costs are eligible and properly classified. Monthly status reports to the City (at minimum) will document progress, expenditures, and any issues, meeting the requirement for regular updates.

We will use HUD's Disaster Recovery Grant Reporting (DRGR) system to record performance and drawdowns. Our staff, having obtained DRGR access in Phase II, will input quarterly performance reports, detailing accomplishments (e.g. number of housing units repaired, linear feet of pipes installed) and financial data, as required by HUD. We will also promptly prepare any required federal reports. Before requesting reimbursements or drawing funds, our financial specialists will review all supporting documentation for that draw, to ensure costs are allowable, reasonable, and properly supported.

This internal review process acts as a preventive audit, catching discrepancies before they reach HUD. Additionally, if a program generates income, we will manage it according to HUD rules. Our meticulous financial oversight prevents fiscal surprises, maintains financial integrity and prepares us for the final audit in Phase V.

Performance Monitoring and Communication: Key Performance Indicators (KPIs) will be monitored: If a project lags or meets obstacles, we will intervene with course corrections: reallocate resources, adjust strategies, or seek HUD's guidance. Internally, bi-weekly team meetings will review all activities. Externally, we propose monthly meetings with City leadership and stakeholders, per the City's desire for ongoing updates. We will also inform the public, updating the CDBG-DR webpage with news, schedules and successes.

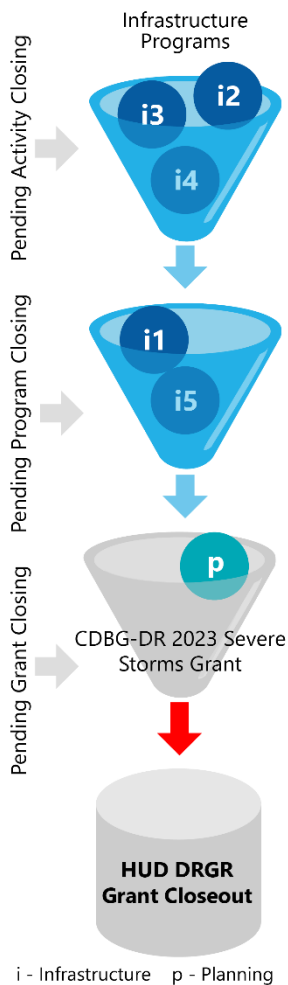
IEM has learned that early wins foster a positive perception and reception of our programs: They demonstrate our commitment to urgency, focus, accountability, and transparency, helping build residents' comfort level. The success of this approach was demonstrated with the Louisiana Office of Community Development, where our programs received only 371 complaints from 51,895 respondents (0.7%).

Deliverables. By the end of Phase IV, projects will be near or at completion, LMI benefit targets will be reached and the grant will be positioned for a smooth closeout. All project costs will be documented and eligible, through rigorous record-keeping and reconciliations. We will have collaborated with FEMA and others to prevent any duplication of benefits. Permits, waivers, and compliance will be secured at all levels, so no bureaucratic hurdles delay progress. Every reimbursement request will document allowability and that contracts and agreements contain the required federal provisions. Cross-cutting regulation compliance is assured and any issues are corrected in real time.

4.1.5 Phase V

Objective. IEM will coordinate the closeout of the City's Action Plan activities, programs and grant efficiently, effectively ensuring activities, programs, and grant are fully documented and in compliance with all regulatory requirements. The Phase V goal is to close the activities, programs, and grant when all activities complete, funds expended, expenditures thresholds verified, reporting requirements are met, and there are no open audits (e.g, the HUD's Closeout Readiness Requirements) are met.

Strategy & Vision. Leverage a systematic closeout process that ensures compliance with federal, state, and local requirements and proper documentation of all activities and expenditures. Closeout all activities, programs, and grant promptly once HUD's Closeout Readiness Requirements have been met and within budget using the documented City approved policies and procedures. Transfer data and knowledge to the City departments in a timely manner.



Methodology. Closing CDBG-DR programs involve a systematic process that ensures compliance with requirements and proper documentation of all activities and expenditures. We understand HUD's closeout time sensitivities (e.g., end of the 8th Federal fiscal year, including the year of allocation) and we diligently close each activity, program, and grant leveraging IEM's Systematic Activity, Program and Grant Closeout Process (Systematic Closeout Process).

Systematic Closeout Process. At IEM, we do not wait until all approved Action Plan activities and programs are completed to start our closeout processes. We close them when the HUD Closeout Readiness Requirements are met. The figure to the left illustrates the flow of infrastructure activities from the Pending Activity Closing queue to the Pending program Closing queue.

Pending Activity Closing. Activities will remain in this queue until the activity meets the HUD Closeout Readiness requirements. Once closed, it moves into the Pending Program Closing queue.

Pending Program Closing. A Program remains in this queue until all of the Program's activities are closed. Once closed, it moves into the Pending Grant Closing queue.

Pending Grant Closing. Closed Programs remain in this queue until all programs are closed.

Grant Closeout. Once all programs are closed, the Grant Closeout process commences and is submitted to HUD for review and approval.

Activity Closeout Processes. The process for closing activities involves several steps to ensure that all financial and performance data are accurately recorded, finalized, compliant with federal regulations (e.g., Uniform Notice and Uniform Guidance) and audit ready. The figure on the following page is a general outline of the process of closing activities.

Verify Completion. IEM will ensure grant program activities are completed, expenditures have been incurred and are consistent with the approved Action Plan. We will conduct final monitoring reviews of each activity to ensure compliance with regulations and program goals.

Prepare for Closeout. We will compile and organize in an easily retrievable format to facilitate the post-closeout audit process. We will review all necessary documentation required and ensure our recordkeeping standards meet HUD requirements. We will confirm records maintained include certifications, eligibility and national object classification, financial records, and evidence that demonstrates the City's compliance with any unique requirements.

Prepare Financial Reconciliation. We will review and reconcile all financial transactions, including any program income, to ensure all transactions are accurately recorded in DRGR and the City's internal records. Our will prepare a budget to actual variance analysis to document significant variances and ensure aggregate activities do not exceed the public services (15%) and planning administration (20%) thresholds. We will verify funds drawn down are properly supported. We will resolve any discrepancies or issues identified. We will address any identified weaknesses in internal control during our assessment.

Review Financial and Performance Data. We will verify compliance with agreement terms, and ensure expenditures are necessary, allowable, allocable, reasonable, and supportable. We will ensure adherence to regulations like procurement, environmental, and labor standards. We will assess post-closeout property and equipment disposition requirements. We will collect evidence demonstrating effectiveness and confirms goals and objectives are met.

Update Activity Status in DRGR and Submit Reports. We will update the DRGR status to complete and enter final activity financial, performance and compliance data including achieved outcomes and accomplishments.

Prepare Closeout Documentation, Submit Closeout Package, and HUD Communications and Approval. We will prepare closeout packages in accordance with HUD guidelines and ensure DRGR required data is accurate and complete. We coordinate HUD communications throughout this process to facilitate a smooth closeout process.

Communicate Outcomes. We will coordinate stakeholder meetings to discuss outcomes, lessons learned and best practices and assist the City to share program results and impacts.

Support Post-Closeout Audit Process. We can support the City with HUD post-closeout audits which may involve responding to queries or providing additional information as requested. We can meet with auditors to discuss the scope of the audit and any preliminary findings. We can draft responses, prepare corrective action plans, and implement corrective actions.



Program and Grant Closeout. When all program activities or the grant's programs are closed we will:

- Aggregate, compile, and conduct a comprehensive review to ensure all closed out properly,
- Evaluate overall success and effectiveness in achieving its goals and objectives,
- Verify financial transactions are reconciled and documented to ensure all funds are accounted for and properly documented,
- Calculate and determine whether there are any unused funds that need to be reallocated or recaptured,
- Prepare the HUD-required final financial, performance, and compliance reports,
- Review compliance with program or grant-specific requirements,
- Resolve any outstanding financial issues or discrepancies, including compliance or audit findings,
- Verify internal accounts are properly closed to prevent financial transactions from being recorded,
- Verify DRGR data is up-to-date, accurate, and reflects the final status of the program or grant,
- Prepare and submit program or grant level reports detailing outcomes and impacts, and
- Communicate results and impacts to stakeholders.

Systematic Closeout Process Benefits. Closing activities and programs when they meet HUD's Closeout Readiness Requirements offers several benefits:

- **Efficient Fund Management.** Closing activities and programs timely allows better tracking and managing of funds, aids in resource allocation management, and reduces mismanagement or overspending risks.
- **Regulatory Compliance.** Timely closeout helps to maintain compliance with federal, state and local regulations by ensuring all requirements are met and documented, reducing the risk of audit findings.
- **Performance Evaluation.** Completing activity and program closeout timely provides an opportunity to evaluate the performance and impact of the activity or program. It allows the City to assess effectiveness of their strategies and make informed decisions for future projects.
- **Documenting and Reporting.** Closing activities and programs ensures that necessary documentation and reporting is completed and submitted timely. It is crucial for transparency and accountability.

Through implementation of the City's approved policies and procedures, IEM will close the CDBG-DR 2023 Severe Storm activities, programs and grant timely. Leveraging the Systematic Closeout Process will ultimately lead to the successful closure of the grant and ensure the City is audit ready. We will maintain clear communication with HUD throughout the process. Ensuring meticulous documentation is a key factor in achieving a smooth closeout.

IEM's proven approach has resulted in preventing errors and fraud in over \$74B of CDBG-DR grant program funds managed by IEM. To date, the HUD Inspector General has not identified any audit findings that require any states or municipalities to pay back misspent funding resulting from fraud, errors, or omissions in an IEM-administered program.

Deliverables.

IEM will provide the closeout deliverables below at each stage of the Systematic Closeout Process:

- **Final Performance Reports.** Report summarizing outcomes and impacts that align with the goals and objectives; includes metrics, appropriate data and analysis on the beneficiaries served, including demographic information and how the program met their needs.

- **Final Financial Report and Financial Reconciliation.** Financial reports that include final budget reconciliation, expenditures, and any adjustments. This will include a budget-versus-actual spending report and a program income analysis, if applicable.
- **Compliance Documentation.** Documentation that demonstrates adherence to all applicable regulations, including procurement, environmental reviews, labor standards, and other regulatory requirements.
- **Audit and Monitoring Reports.** Reports summarizing any audits or monitoring activities conducted during the grant period, along with responses to findings and corrective actions taken, if necessary.
- **Completed Closeout Checklists.** An administrative and programmatic requirements checklist that incorporates HUD's Closeout Readiness Requirements.
- **Final Inventory and Disposition Plan.** Documentation of all grant-funded property and equipment and disposition plans, if applicable.
- **Project Closeout Report and Summary.** An executive summary that encapsulates the entire activity, program, or grant, including objectives, outcomes, financial status, and compliance with grant terms.
- **Lessons Learned.** A document capturing insights and lessons learned throughout the activity, program, or grant's lifecycle, which can inform future projects and improve processes.
- **Stakeholder and Public Communications.** Stakeholder-appropriate materials prepared for communicating completion and success to stakeholders, the public, and community partners. This may include presentations, press releases, or community meetings.

4.1.6 Audits

IEM approach to audits works hand-in-hand with closeout as we ensure all files are audit-ready. IEM has developed audit-tested protocols to reconcile grant funds (obligated versus actual), log and track funds to the appropriate funding source and ensure that the funds were used for an eligible purpose. We monitor program-projected budgets against actual expenses. We also monitor projected obligation of funding. At the project level, our accountants track, verify and report on funds drawn from HUD, those awarded to beneficiaries, applicant-escrowed and –returned funds, as well as subrogated dollars.

Experience by the Numbers

17 million applications processed
with zero clawbacks

The IEM Team will work with the City for recommended improvements to data collection methods, expectations, and fault handling procedures that can protect the State's interest in maintaining compliance. A deliberate daily, weekly, and monthly process of examination, process improvement, and remediation must take place on every funding stream to properly manage process and risk. IEM will perform fiscal monitoring reviews at set trigger points, such as the 25%, \$1 million mark, at final draw request, or as indicated

by the risk assessment and actual program performance.

IEM strongly recommends that a risk-based financial quality control plan be created, if one is not currently in place. The plan rationally connects program risks to appropriate levels of monitoring activity and is a living document, updated as needed throughout the recovery grant programs' lifespan. For example, as the frequency of transactions for a particular program decreases and with them the associated risks, that program will drop lower on the monitoring priorities list. The quality control monitoring plan will be revised to reflect the change.

Changes to federal and state guidance may also affect the risk assessment, and those changes will need to be reflected in the plan. The plan will also include appropriate strategies to help each program manage and mitigate the financial risks. The IEM Team will review each program's internal controls, procedures, and policies regarding deterrence, detection, and record-keeping to ensure that we can demonstrate compliance with all legal and regulatory requirements. Risk assessments will also be performed for each program partner.

We have experience dating back to Hurricane Katrina in administering, collecting, and processing subrogated funds. We have handled audits for a variety of funding streams. Some examples include LA Restore (CDBG-DR), Virginia's

Homeowner Assistance Fund, and Prince William County (FEMA/Treasury). In these instances, we used our reporting and reconciliation systems to ensure that funds received from applicants, HUD, insurance, and all other sources are reconciled with the system of record.

Quality Assurance / Quality Control Procedures: IEM will monitor implementation contractor performance and evaluate administrative and implementation procedures at the service level. This includes tasks such as reviewing subrecipient deliverable requirements and holding them accountable for work product, scope, schedule, and budget. We measure performance against contract requirements, as outlined in grant agreements, project execution plans, and projected benchmarks and milestones. We evaluate workflow processes for efficiency, recommending process improvements. We monitor compliance with environmental regulations, Fair Labor Standards, Section 3 hiring, and other flow-down contract requirements. We provide advisory services on the development of new or refined QA/QC program design, to ensure compliance with program scope of work, accuracy of reporting records, and documentation requirements.

- Defining review procedures to implement compliant processes and perform risk analysis for each process and funding stream.
- Performing gap analysis to determine outliers that define system compliance issues.
- Reviewing account reconciliations necessary to control and report on existing Project Worksheet accounts, applicant balances, system interfaces, and other control balances.
- Performing quality assurance/quality control reviews and assessments associated with the payments process, to ensure compliance with federal and state regulations as well as industry best practices.
- Reviewing reconciliations to determine if backlogs exist for the Request for Reimbursements process.
- Auditing financial program standards against those set forth in 2 CFR 200 and all applicable federal cross-cutting regulations and requirements.

4.1.7 Deliverables

In accordance with the RFP Section 3.5 Deliverables, IEM proposes to provide the City of Fort Lauderdale with the services and deliverables outlined in 3.2 Scope of Services. In the above section, we detailed our proposed methodology to deliver these services. We ensure that all services and deliverables not just meet but exceed our standard and that the City receives industry-leading deliverables. The following section of our proposal (**Section 4.2 Timeline**) provides a proposed timeline and deliverables schedule for consideration.

4.2 Timeline

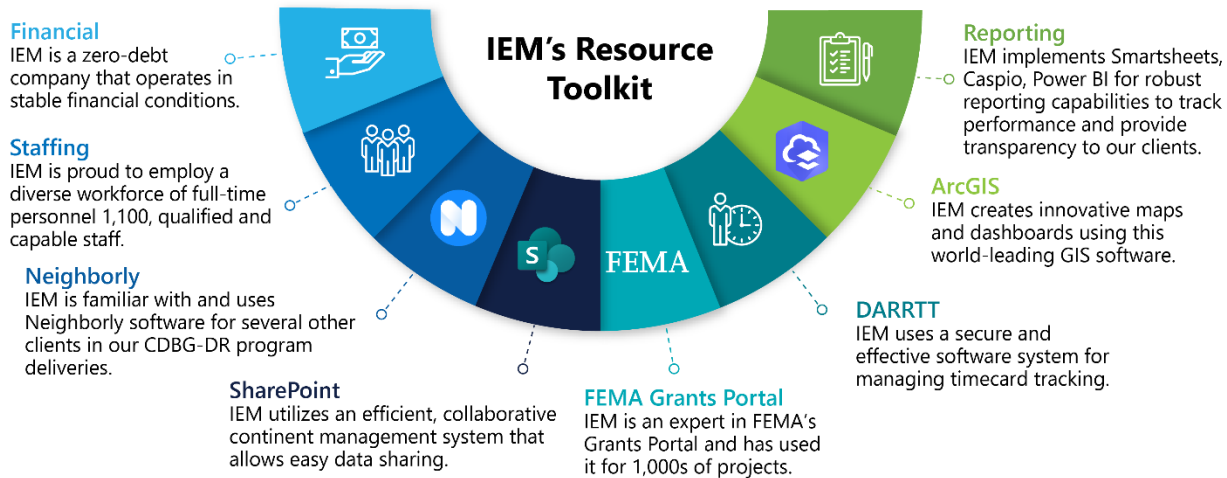
IEM offers an outcome-based approach for managing our work on this contract – combining the City’s goals and IEM’s lessons learned on past projects – to create a clear path to the overall recovery of the City of Fort Lauderdale as it copes with the devastation of the 2023 severe storms/flooding. With the concurrent -- sometimes competing -- timelines and priorities, time management is crucial. IEM has a track record of providing the City with experienced professionals who respond to quickly-changing priorities. The IEM Team will expedite our response in Fort Lauderdale, considering the phase of each application, the City’s agreements with HUD, and all programmatic, regulatory, cost effectiveness, and compliance requirements.

The figure on the following page depicts our proposed scheduling methodology (timeline) for effectively managing and executing the work in the optimum time. Our timeline is stated in calendar days and includes proposed dates, deliverables, and completion dates, in accordance with the RFP specifications.

TASK/DELIVERABLE	DESCRIPTION OF TASK/DELIVERABLE	START DATE	END DATE	DURATION (CALENDAR)
PHASES I - V				
Program Management & Oversight	Overall project management, coordination, and quality control across all phases. Regularly monitor the schedule, manage risks, and maintain project records in a secure system accessible to City staff from kickoff through closeout. This task is ongoing throughout the project duration.			
PHASE I				
Kickoff Meeting	Hold kickoff meeting with City staff and the consultant team to initiate the project, confirm scope, roles, timeline, and communication protocols. Establish project documentation systems and set up the CDBG-DR webpage for public information and transparency.			
Citizen Participation Plan	Develop a CDBG-DR-specific Citizen Participation Plan detailing how the City will solicit public input and record comments for the disaster recovery program. Obtain all required City approvals for the plan.			
Financial Management & Certification	Coordinate with the City's Finance Department to complete HUD's Financial Management and Grant Compliance Certification checklist (documenting the City's financial controls and grant management procedures). Prepare the completed certification for submission to HUD.			
Public Outreach Preparation	Schedule and publicly announce the required community meetings and City Commission public hearings per the Citizen Participation Plan. Post all required public notices on the City's CDBG-DR website to inform residents of upcoming engagement opportunities.			
PHASE II				
HUD DRGR System Access	Apply for and obtain access to HUD's Disaster Recovery Grant Reporting (DRGR) system via the City's Housing & Community Dev. Division, ensuring the system is ready for Action Plan submission and ongoing reporting.			
Needs Assessment & Survey	Conduct a comprehensive disaster needs assessment. Develop a public survey to gather data on unmet needs (e.g. housing, infrastructure) and obtain City approval to release it. Publish the survey and collect responses to inform the Action Plan.			
Public Meetings & Hearings	Hold at least 3 community meetings (June 2025) to present findings and gather citizen input. Conduct 2 City Commission public hearings (one before posting the Action Plan draft and one before submission) to formally receive comments and approve the Action Plan.			
Draft Action Plan	Based on the needs assessment and public input, prepare the draft CDBG-DR Action Plan outlining proposed programs and budgets. Publish the draft Action Plan for a 30-day public comment period on the City's website to gather feedback from residents and stakeholders. Hold required public meeting.			
Finalize Action Plan	Incorporate public comments and City leadership feedback into the Action Plan. Coordinate City Commission review and adoption of the final Action Plan (Target: 8/5/2025), obtaining official City approval to submit the plan to HUD.			
Submit Action Plan to HUD	Submit the final Action Plan to HUD through the DRGR system, including all required attachments and the completed financial certification.			
PHASE III				
HUD Action Plan Review & Approval	HUD reviews the submitted Action Plan (~45 days). During August–September 2025, respond to any HUD inquiries or requests for information. Achieve HUD approval by late September 2025. Execute the CDBG-DR Grant Agreement with HUD upon approval (early October 2025), officially obligating the \$88 million in disaster recovery funds to the City.			
Publish Approved Action Plan	Upon HUD approval, present a physical copy of the approved Action Plan to the City's Housing & Community Development office and post the approved plan on the City's CDBG-DR webpage for public access. Notify the community that the Action Plan is approved and funding is secured.			

TASK/DELIVERABLE	DESCRIPTION OF TASK/DELIVERABLE	START DATE	END DATE	DURATION (CALENDAR)
Implementation Kickoff Meeting	With the grant agreement in place, conduct an internal kickoff meeting to initiate implementation. Convene City departments (Housing, Finance, Public Works, etc.) to assign responsibilities for program rollout, procurement, compliance, and reporting in Phase III.	IEM designates confidentiality of the following material pursuant to Florida Statute 119.0715(2) PUBLIC INFORMATION		
Develop Program Policies & Procedures	Develop comprehensive written policies and procedures (P&P) for each recovery program/activity outlined in the Action Plan (e.g. housing rehab, infrastructure projects, grant programs). Include eligibility criteria, application processes, and compliance requirements. Begin drafting during HUD's review period to expedite completion of P&P documents.			
City Review of P&P	Submit the draft program P&P to City departments (Housing & Community Dev., Finance, Risk Management, Legal) for review and approval. Revise the P&P documents based on feedback to ensure they meet City and HUD requirements.			
Finalize & Publish P&P	Finalize all program policies and procedures after City approval. Publish the approved P&P documents on the City's website for transparency, ensuring they are in place before programs launch.			
Staff Training on P&P and Compliance	Train City staff and any partner agencies on the new program procedures and federal compliance requirements. Cover topics such as HUD environmental review (24 CFR Part 58), Davis-Bacon labor standards, procurement rules, and DRGR reporting. Ensure the team is prepared to implement programs in full compliance.			
DRGR Reporting Preparation	Configure internal systems for HUD reporting. Set up templates and assign responsibilities for quarterly performance reporting in DRGR. Ensure financial tracking systems align with DRGR to facilitate accurate quarterly reports starting Q4 2025.			
Public Outreach Update	Inform the community of program status now that HUD approval is obtained. Provide a public update (November 2025); update the City's website or hold a community briefing to let residents know that funding is secured and that recovery programs will soon launch.			
PHASE IV				
Program Launch (Begin Implementation)	Launch the CDBG-DR funded programs now that P&P are in place. Announce the opening of applications for housing and business recovery programs and initiate planning for infrastructure projects. Ensure the public can access program information and application materials (program "go live" date of 11/17/25).			
Procurement of Projects/ Services	Kick off procurement (3 month period) for recovery projects. Prepare bid packages and RFPs for construction projects and professional services (engineering, environmental, etc.). Advertise solicitations starting early 2026 and ensure compliance with all federal and City procurement standards (including Section 3 outreach and verification of non-debarred contractors).			
Environmental Reviews	Conduct required environmental reviews for each project under 24 CFR Part 58 (e.g. historic preservation, floodplain management). Initiate reviews in parallel with procurement to prevent delays. Obtain all necessary environmental clearances before projects commence construction.			
Project Selection & Awards	Evaluate proposals/applications and select subrecipients or contractors for each program. Award contracts or subrecipient agreements for project implementation, obtaining City Commission approval for major awards as needed. Aim to have all key projects awarded by mid-2026.			
Begin Project Implementation	Start implementing projects on a rolling basis as contracts are executed. Initial project activities (e.g. construction groundbreakings, home rehabilitations, grant disbursements) should begin by Q2 2026 once the first contracts are in place.			

TASK/DELIVERABLE	DESCRIPTION OF TASK/DELIVERABLE	START DATE	END DATE	DURATION (CALENDAR)
Ongoing Project Management & Reconciliation	Provide continuous management for all active projects. Hold monthly project status meetings and perform monthly financial reconciliations with the City's finance team to track expenditures and ensure timely drawdowns. Adjust project plans as needed to stay on schedule and within budget.			
Quarterly HUD Reporting & City Updates	Prepare and submit quarterly Performance Reports in DRGR throughout implementation (detailing expenditures, outputs, and LMI benefit progress). Provide the City with required monthly status updates on program progress, keeping City leadership informed and ensuring transparency.			
Monitoring & Compliance Oversight	Monitor all projects and programs for compliance with HUD requirements. Conduct regular field inspections and desk reviews (e.g. verify Davis-Bacon payrolls, Section 3 hiring, environmental mitigation measures) and facilitate any HUD/City monitoring visits or audits. Ensure any compliance issues are corrected promptly. Track beneficiary data to confirm at least 70% of grant funds benefit low/moderate-income residents, adjusting outreach or program criteria if needed to meet this target.			
Ongoing Community Engagement	Maintain transparency and community engagement during implementation. Provide annual public updates or town hall meetings (e.g., 2027 Year in Review) to report progress and accomplishments to residents. Continue to post progress updates on the City's website and celebrate major project milestones (e.g., press releases, ribbon-cuttings, etc.).			
Complete All Projects	Wind down and complete all remaining projects. Initial housing projects will complete in 2026. By early 2030, finish all construction and program activities to meet grant deadlines. Conduct final inspections for each project and ensure all project files contain required completion documentation and compliance records.			
Final Fund Expenditure & Closeout Prep	Ensure 100% of CDBG-DR funds (and any program income) are expended by the end of the implementation period. Reallocate any unspent funds via Action Plan amendments (with City/HUD approval) before the deadline. Begin compiling final performance data and resolving any outstanding issues (e.g. missing documents or compliance findings) in preparation for formal closeout.			
PHASE IV				
Master Financial Reconciliation & Audit	Perform a thorough reconciliation of all grant financials. Verify that total expenditures in City records match HUD's DRGR system records and that 100% of the grant (plus any program income) is accounted for. Conduct an independent audit of the CDBG-DR grant (if not already covered by annual Single Audits) to certify compliance. Address any audit findings or recommendations.			
Final Performance Report & Closeout Package	Prepare the Final Performance Report summarizing all activities, expenditures, and beneficiaries. Enter final outcome data into DRGR and mark all activities as complete. Compile the grant closeout package with all required documentation, including the financial reconciliation, narrative summaries, and signed certifications for City and HUD.			
HUD Closeout Review & Acceptance	Submit the closeout package to HUD and coordinate through HUD's review process. Respond to any follow-up requests from HUD during the review. Obtain any required City Commission resolution for formal acceptance of grant closeout. Anticipate HUD's issuance of a Grant Closeout Agreement/Letter by October 2030, formally closing the grant.			
Post-Closeout Records & Transition	After formal closeout, archive all project files and financial records according to HUD's record-retention requirements (at least 3 years post-closeout). Ensure the City is prepared for any future audits (e.g. HUD OIG). Transition completed projects to normal operations/maintenance and conclude all consultant activities.			



Financial Support

IEM is a zero-debt company that operates in stable financial conditions. IEM's business generates consistent positive annual cash flow and maintains a strong financial position. IEM has maintained this financial stability by wisely adding to our portfolio of work. When pursuing new opportunities, we carefully manage risk and only pursue them if we can continue to meet the contractual obligations of our clients. As a result, we have not overextended our commitment to provide services to any of our customers. IEM is audited annually and has received an unmodified audit opinion every year. IEM can assure clients that its financial capacity is more than enough to foster the necessary assets to continue providing the requested services.

Facilities

IEM is headquartered in Raleigh, North Carolina. We have one office in Tallahassee, Florida and six additional offices across Louisiana, Virginia, and Puerto Rico. We will perform the requested services in a hybrid capacity (remote/onsite). When onsite, we can work out of Nan McKay & Associates' local offices in Miami, Miami-Gardens, and Lakeland.

Technology Capabilities

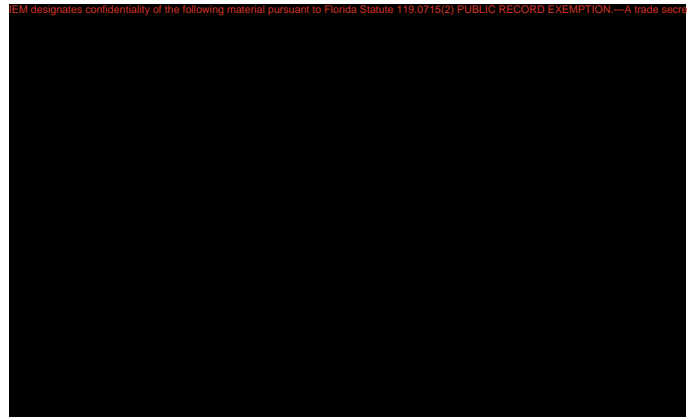
Content Management System (CMS). IEM uses SharePoint Online system, which is part of the Microsoft 365 cloud platform, for CMS. It is collaborative workspace that allows our clients to securely access the site for document exchange, file sharing, status reporting, and program and schedule updates.

Disaster Associated Response and Recovery Task Tracker (DARRTT). IEM recently developed and implemented the Disaster Associated Response and Recovery Task Tracker (DARRTT), a PowerApp-based system. This system is used to correctly track and allocate work hours and tasks based on project requirements, in 15-minute increments.

ArcGIS. IEM's GIS Team, IEM GEO, uses ArcGIS Pro and ArcGIS Online to build customized dashboards and associated workflows for our clients. Using these tools, we have developed dozens of emergency management-focused interactive web maps and online dashboard applications to assist government entities in visualizing and analyzing multiple complex data sources, including geolocation data, within a single platform.

Reporting Tools. At IEM, we utilize Smartsheet, Caspio, Microsoft Power BI and other reporting tools and systems of record. Through these tools, we ensure that applicant interactions, communications, documentation, and verifications are entered into the system of record to optimize compliance with program rules and funding requirements.

We train our staff members and City staff on system functionality, completeness of records, and accuracy of data entry. IEM's one-over-one quality review process adds an additional layer of review, prior to submission of eligibility, verification and duplication of benefits, and closeout documentation.



Other Resources

Staffing. We can staff and scale teams of tightly integrated and highly experienced experts for the City. Our team can deploy staff on short notice, to augment staff onsite when needed. **IEM has been selected repeatedly to support our nation's most recent disasters:** Hurricanes Fiona, Maria, and Irma in Puerto Rico, Hurricane Harvey in Texas, Hurricanes Irma, Ian, and Idalia in Florida.

As an experienced emergency management and disaster recovery company, IEM has **successfully deployed response or recovery operation resources within 72 hours of contract execution and sometimes with less than 24 hours' notice.** Our disaster response contracts span the entire United States including Puerto Rico. Program resources were identified in each of these deliveries, staff was onboarded and trained, and teams deployed rapidly upon clients' requests.

Some examples of projects we have provided rapid deployment of personnel in the last five years are outlined the figure below.

NYS DHSES Public Assistance and Hazard Mitigation Assistance	FDEM State Emergency Operations Center Support	Puerto Rico Electric Power Transmission and Distribution System	Various Clients, Hurricanes Helene and Milton
In the aftermath of Superstorm Sandy, IEM joined as a major partner to the team supporting the State of New York with \$14.5 billion FEMA PA Program and \$1.5 billion HMGP funding. IEM deployed more than 150 trained PA and/or HMGP personnel over a 90-day period some within as little as 48 hours.	IEM has provided emergency response and recovery staff augmentation to support the historic impacts of Hurricanes Milton, Helene, Debby, and Ian. In response to Hurricane Ian, IEM deployed over 30 people in less than 48 hours after being requested by the state, with team members staying on-site for an average of three months.	In the days leading up to Hurricane Fiona, IEM surged to 60 staff members to provide assistance in multiple areas including Grants Management, Debris Monitoring, Damage Assessment, After Action Review, Emergency Management Processes, and Meteorological support.	IEM deployed over 200 personnel to the states of Florida, South Carolina, North Carolina, and Virginia to support state EOCs. Most personnel were deployed within 48 hours of each state's initial request. We deployed 130 personnel within 24 hours to Florida's State EOC and throughout Florida on behalf of FDEM.

Rapid Deployment Examples



Rehabilitation, Reconstruction, Elevation, & Mitigation (RREM) Program Management

New Jersey Department of Community Affairs (DCA), Division of Disaster Recovery and Mitigation (Division name changed in 2021)

OCTOBER 2017 – JANUARY 2023 | \$ 600 MILLION

IEM was contracted by DCA to assist in completing the housing recovery phase in the aftermath of Superstorm Sandy, providing project management services for Pathway B Applicants. Pathway B consisted of Applicants who identified and selected their own program-eligible, State-approved builder to complete home improvement, elevation, or construction projects under RREM and Low-to-Moderate Income (LMI) Homeowners Rebuilding Programs (funded by CDBG-DR dollars).

IEM conducted over 165 trainings to 130 staff members for this Program. Training sessions peaked at 97 attendees. We provided over 278.50 hours of trainings. Training topics included basic program operations, construction project management, supplemental funding, and baseline site inspections. We helped 1,261 New Jersey homeowners who sustained damages as a result of Hurricane Sandy complete their construction projects and successfully get back home. Of those, we also assisted 1,248 to close out of the program. **As a result of our training efforts, we assisted 1,248 applicants to close out the RREM/LMI Programs.**

"IEM has been a great partner in our recovery process. Most importantly IEM has demonstrated their ability to provide customer service for homeowners navigating the challenges and hardships of the disaster recovery process."

-Samuel R. Viavattine, State of New Jersey Department of Community Affairs, Sandy Recovery Division

REFERENCE INFORMATION

- Sam Viavattine, Director, 609-633-8711, Samuel.Viavattine@dca.nj.gov
- Address: 101 S. Broad Street, PO Box 823, Trenton, NJ 08625

TOTAL COST OF PROJECT

- **Estimated:** \$25,286,000
- **Actual:** After several contract amendments, final price was \$27,218,695.00

6.0 Minority/Women (M/WBE) Participation

IEM is a minority, woman-owned company that has long embraced the concepts of diversity and fairness. IEM is committed to contributing to the communities in which we work and helping their residents obtain a fair share of available economic opportunities. In addition, minority-owned, women-owned, small, and other disadvantaged or emerging businesses make critical contributions to IEM and our clients. We seek to increase our visibility with the disadvantaged business community through marketing and outreach assistance programs.

IEM is subject to diversity subcontracting plans across multiple federal, state, and local contracts. IEM meets, and consistently exceeds, these diversity subcontracting requirements. Our small and diverse business subcontractors are crucial members of the IEM Team. While IEM primarily relies on existing company source lists for subcontracting needs, when new sources are required, IEM identifies potential subcontractors using state certification databases; dynamic small business searches; the System for Award Management (SAM); veterans service organizations; the National Minority Purchasing Council Vendor Information Service; the Research and Information Division of the Minority Business Development Agency in the Department of Commerce; or small, HUBZone, SOB, and WOSB trade associations

Our leadership and staff reflect those values, and we look for opportunities to ensure our workforce, project approaches and methods, and values are inclusive across race, ethnicity, gender identity, sexual identity, and access and functional needs designations. Our team has worked in previous projects and positions to develop systems that better address equality.

Company	About	Certifications
	Managed over \$277B in federal funds	WBE under the WDENC

The IEM Team actively works to identify and remove barriers in communities to ensure those most in need receive vital assistance.

IEM leads by connecting goals and objectives to ensure fair outcomes. When we begin forming a project work plan, we work to identify not only the client's needs but also those of their constituents. This means providing proactive leadership, collaborating with community leaders and organizations at the grassroots level, and practicing transparent decision-making. We use disaggregated data to identify effective methods to equitably utilize information to provide our clients with a transparent, non-punitive insight into their constituents' needs. We center equity in our work by facilitating continuous collaboration from all stakeholders and recognizing everyone's contributions to create a space of empowerment and engagement that allows people to see that their voices matter.

We hand selected our subcontractor, Nan McKay & Associates, to assist with training, technical assistance, assistance with action plan development, financial management and DRGR support, and grants management. We have existing relationships with Nan McKay & Associates. IEM also is certified as a WBE from the Women's Business Enterprise National Council (WBENC).

7.0 Subconsultants

We have selected Nan McKay & Associates as our subconsultant for this contract. They are a nationally-recognized leader in government-supportive strategic services and program management since 1980, over 43 years. Annually, they manage \$4 billion in federal assistance funds, conduct more than 500 trainings, and perform more than 350,000 housing inspections throughout the country. **Nan McKay & Associates has supported the programming and distribution of billions of dollars in CDBG-DR funding nationwide. Their team provided Harris County, Texas with CDBG-DR action plan support, helping the County to receive \$1.25 billion in CDBG-DR funding specifically for recovery programming from Hurricane Harvey.** They have assisted with the distribution of more than \$12 billion in CARES Act funding throughout the country, including Miami-Dade County, Florida; St. Louis County, Missouri; Harris County, Texas; the State of South Dakota; the State of Massachusetts; the State of New Jersey; and the State of South Carolina.

Additionally, Nan McKay & Associates worked with IEM on a technical assistance contract with HUD to provide trainings to **Public Housing Authorities in the State of**

IEM and Nan McKay have served as a certified TA provider to HUD for a number of decades.

Florida on Disaster Readiness, Response, and Recovery. Our teams collaborated seamlessly to deliver quality trainings throughout the State of Florida and to the satisfaction of the HUD client, who commented about being excited to hold more of these types of trainings throughout other regions in the country.



POINT OF CONTACT

Contact Person: Catherine Ures

Local Addresses:

- 20 SE 3rd Avenue, 3rd Floor,
Miami, FL 33131

- 1111 Park Centre Boulevard, Suite
104, Miami Gardens, FL 33169

Telephone Number: 1.800.783.3100

Email: catherine.ures@nanmckay.com



GOODS AND SERVICES

1. Training and Technical Assistance
2. Assistance with Action Plan Development
3. Financial Management and DRGR Support
4. Grants Management

Non-debarment

Neither Nan McKay & Associates, nor its principals, have ever been debarred from providing any services to the Federal Government, any U.S. state, or any local government agency. A copy of their sam.gov report is provided on the following page.

State of Florida

Nan McKay & Associates is insured and authorized to conduct business within the State of Florida. A copy of their active Certificate of Status and our Certificate of Insurance is provided on the following page.

Capacity and Financial Viability

Nan McKay & Associates has the proven ability to successfully manage all tasks assigned by IEM. At present Nan McKay & Associates has a line of credit of \$1,500,000, along with working capital of approximately \$10,000,000. Nan McKay & Associates has the internal management, financial capacity, information technology, accounting, and systems resources necessary to effectively implement and manage the tasks assigned by IEM. A copy of their

financial statements are provided on the following pages. As a privately held, family-owned entity, their detailed financial statements are confidential. However, they regularly engage an independent CPA firm to perform an annual financial review. They have provided the cover letter issued by their CPA firm confirming the completion and results of this review. Should the client require additional financial information, they are prepared to securely provide such details directly to the client upon request, in a confidential manner consistent with their internal policies.



NAN MCKAY & ASSOCIATES, INC.

Unique Entity ID GL2HWFLNBT51	CAGE / NCAGE 3K1E4	Purpose of Registration All Awards
Registration Status Active Registration	Expiration Date Oct 7, 2025	
Physical Address 1810 Gillespie WAY Suite 202 El Cajon, California 92020-0920 United States	Mailing Address 1810 Gillespie WAY STE 202 El Cajon, California 92020-0920 United States	

Business Information

Doing Business as (blank)	Division Name (blank)	Division Number (blank)
Congressional District California 51	State / Country of Incorporation California / United States	URL http://www.nanmckay.com

Registration Dates

Activation Date Oct 9, 2024	Submission Date Oct 7, 2024	Initial Registration Date Oct 8, 2003
---------------------------------------	---------------------------------------	-------------------------------------------------

Entity Dates

Entity Start Date Nov 1, 1980	Fiscal Year End Close Date Dec 31
-----------------------------------------	---------------------------------------------

Immediate Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Highest Level Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Executive Compensation

Registrants in the System for Award Management (SAM) respond to the Executive Compensation questions in accordance with Section 6202 of P.L. 110-252, amending the Federal Funding Accountability and Transparency Act (P.L. 109-282). This information is not displayed in SAM. It is sent to USAspending.gov for display in association with an eligible award. Maintaining an active registration in SAM demonstrates the registrant responded to the questions.

Proceedings Questions

Registrants in the System for Award Management (SAM.gov) respond to proceedings questions in accordance with FAR 52.209-7, FAR 52.209-9, or 2. C.F.R. 200 Appendix XII. Their responses are displayed in the responsibility/qualification section of SAM.gov. Maintaining an active registration in SAM.gov demonstrates the registrant responded to the proceedings questions.

Exclusion Summary

Active Exclusions Records?

No

SAM Search Authorization

I authorize my entity's non-sensitive information to be displayed in SAM public search results:

Yes

Entity Types

Business Types

Entity Structure Corporate Entity (Not Tax Exempt)	Entity Type Business or Organization	Organization Factors (blank)
Profit Structure For Profit Organization		

Socio-Economic Types

Women-Owned Business


Check the registrant's Reps & Certs, if present, under FAR 52.212-3 or FAR 52.219-1 to determine if the entity is an SBA-certified HUBZone small business concern. Additional small business information may be found in the SBA's Dynamic Small Business Search if the entity completed the SBA supplemental pages during registration.

Financial Information


Accepts Credit Card Payments Yes	Debt Subject To Offset No
EFT Indicator 0000	CAGE Code 3K1E4

Points of Contact


Electronic Business

 Sarah Waitt	1810 Gillespie WAY Suite 202 El Cajon, California 92020 United States
JOHN McKay	1810 Gillespie WAY Suite 202 El Cajon, California 92020 United States

Government Business

 Catherine Ures	1810 Gillespie WAY Suite 202 El Cajon, California 92020 United States
John McKay	1810 Gillespie WAY Suite 202 El Cajon, California 92020 United States

Past Performance

 Sarah Waitt	1810 Gillespie WAY Suite 202 El Cajon, California 92020 United States
JOHN McKay	1810 Gillespie WAY Suite 202 El Cajon, California 92020 United States

Service Classifications

NAICS Codes

Primary	NAICS Codes	NAICS Title
Yes	541611	Administrative Management And General Management Consulting Services
	541219	Other Accounting Services
	541618	Other Management Consulting Services
	541990	All Other Professional, Scientific, And Technical Services
	611430	Professional And Management Development Training
	925110	Administration Of Housing Programs

Disaster Response

Yes, this entity appears in the disaster response registry.

Bonding Levels	Dollars
(blank)	(blank)

Any

(blank)

(blank)

State of Florida

Department of State

I certify from the records of this office that NAN MCKAY AND ASSOCIATES, INC. is a California corporation authorized to transact business in the State of Florida, qualified on July 6, 2004.

The document number of this corporation is F04000003788.

I further certify that said corporation has paid all fees due this office through December 31, 2025, that its most recent annual report/uniform business report was filed on February 25, 2025, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Fifteenth day of April, 2025*




Secretary of State

Tracking Number: 3294172412CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/16/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION** IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Spectrum Risk Management 74 Discovery Irvine, CA 92618 www.spectrumrisk.com 0C77485	CONTACT NAME: Account Manager PHONE (A/C, No, Ext): 949-756-5730 FAX (A/C, No): 949-756-5740 E-MAIL ADDRESS: office@spectrumrisk.com
INSURED Nan McKay and Associates, Inc. 1810 Gillespie Way #202 El Cajon CA 92020	INSURER(S) AFFORDING COVERAGE INSURER A: Continental Casualty Company NAIC # 20443 INSURER B: Travelers Casualty and Surety Co of Amer 31194 INSURER C: The Hanover American Insurance Company 36064 INSURER D: Republic-Vanguard Insurance Company 40479 INSURER E: INSURER F:

COVERAGES

CERTIFICATE NUMBER: 81917721

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Deductible- \$0 GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			5094620901	9/25/2024	9/25/2025	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
A	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			5094620901	9/25/2024	9/25/2025	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$10,000			5094621188	9/25/2024	9/25/2025	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N <input type="checkbox"/>	N / A	Not insured through this Agency			PER STATUTE E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			596375059	9/25/2024	9/25/2025	\$5,000,000 Per claim/Agg. Retention \$50K
B	Privacy and Security, Media Liability			108049035	5/19/2024	5/19/2025	\$5,000,000 Per claim/Agg.- Retention \$25K
C	Crime coverage- Client Property			BD3 1007035 12	5/4/2024	5/4/2025	\$1,000,000 limit/ Retention \$5K
D	Employment Practices Liab-3rd party			DVA106257401	1/15/2024	1/15/2025	\$1,000,000 Each claim- Retention \$175K

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Insured's Copy

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Jim Waterhouse

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ACORD 25 (2016/03)

The ACORD name and logo are registered marks of ACORD

CAM #25-0677

Exhibit 3

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/25/2025

10/16/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Lockton Insurance Brokers, LLC CA License #0B99399 777 S. Figueroa Street, 52nd fl. Los Angeles CA 90017 213-689-0065	CONTACT NAME: PHONE (A/C. No. Ext): E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A: National Fire Insurance Co of Hartford INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	FAX (A/C. No.): NAIC # 20478
INSURED 1531598 Nan McKay and Associates, Inc. 1810 Gillespie Way, Ste. 202 El Cajon CA 92020		

COVERAGES**CERTIFICATE NUMBER:** 19991890**REVISION NUMBER:** XXXXXXXX

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX DAMAGE TO RENTED PREMISES (Ea occurrence) \$ XXXXXXXX MED EXP (Any one person) \$ XXXXXXXX PERSONAL & ADV INJURY \$ XXXXXXXX GENERAL AGGREGATE \$ XXXXXXXX PRODUCTS - COMP/OP AGG \$ XXXXXXXX \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			NOT APPLICABLE			COMBINED SINGLE LIMIT (Ea accident) \$ XXXXXXXX BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX AGGREGATE \$ XXXXXXXX \$ XXXXXXXX
A A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y / N <input type="checkbox"/> N / A		N	7040351998 (AOS) 7040351984 (CA)	9/25/2024 9/25/2024	9/25/2025 9/25/2025	X PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION** See Attachment19991890
Evidence of Insurance

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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8.0 Required Forms

IEM is pleased to provide the forms listed below, starting on the following page. Per the Q&A responses, Anti-Human Trafficking Affidavit, Exhibit 1: Sample Timeline for Phases 1-3, and Exhibit 2: The Universal Notice are not required with the proposal submission and are for informational purposes only.

- Proposal Certification
- Cost Proposal
- Non-Collusion Statement
- Non-Discrimination Certification Form
- E-Verify Affirmation Statement
- Affidavit of Compliance
- Sample Insurance Certificate
- W-9 for Proposing Firm
- Active Status Page from Division of Corporations – Sunbiz.org
- Addendum 1
- Addendum 2

CITY OF FORT LAUDERDALE BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder/proposer to ensure that their response is submitted electronically through the [City's on-line strategic sourcing platform](#) prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) IEM International, Inc. EIN (Optional): 72-1045884

Address: 5420 Wade Park Blvd Ste 140

City: Raleigh State: NC Zip: 27607-4188

Telephone No.: (919) 990-8191 FAX No.: (919) 237-7468 Email: contracts@iem.com

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): _____

Total Bid Discount (section 1.05 of General Conditions): _____

Check box if your firm qualifies for DBE (section 1.09 of General Conditions): ☐

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued
<u>1</u>	<u>4/10/2025</u>	_____	_____	_____	_____	_____	_____
<u>2</u>	<u>4/15/2025</u>	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A.

N/A

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

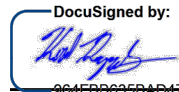
Keith Reynolds

Name (printed)

4/15/2025

Date

DocuSigned by:



964FDD665BAD47E...

Signature

Director, Contract Operations and Compliance

Title



City of Fort Lauderdale • Procurement Services Division
 101 N.E. 3rd Ave., Suite 1650 • Fort Lauderdale, Florida 33301
 954-828-5933 Fax 954-828-5576
purchase@fortlauderdale.gov

been remedied or resolved in a manner satisfactory to the City's Contract Administrator or failure to comply with this Agreement. The amount withheld shall not be subject to payment of interest by City.

CHANGED TO:

Consultant may submit invoices for compensation no more often than monthly, but only after the services for which the invoices are submitted have been completed. An original invoice plus one copy are due within fifteen (15) days of the end of the month except the final invoice which must be received no later than sixty (60) days after this Agreement expires. Invoices shall designate the nature of the services performed and/or the goods provided.

The payments will be made at intervals as described above upon successful completion of deliverables.

City shall pay Consultant within forty-five (45) days of receipt of Consultant's proper invoice, as provided in the Florida Local Government Prompt Payment Act

To be deemed proper, all invoices must comply with the requirements set forth in this Agreement and must be submitted on the form and pursuant to instructions prescribed by the City's Contract Administrator. Payment may be withheld for failure of Consultant to comply with a term, condition, or requirement of this Agreement.

Notwithstanding any provision of this Agreement to the contrary, City may withhold, in whole or in part, payment to the extent necessary to protect itself from loss on account of inadequate or defective work that has not been remedied or resolved in a manner satisfactory to the City's Contract Administrator or failure to comply with this Agreement. The amount withheld shall not be subject to payment of interest by City.

4. Solicitation Document VI- Cost Proposal Page

CHANGE FROM:

Proposer Name: _____

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.



City of Fort Lauderdale • Procurement Services Division
 101 N.E. 3rd Ave., Suite 1650 • Fort Lauderdale, Florida 33301
 954-828-5933 Fax 954-828-5576
purchase@fortlauderdale.gov

~~Cost to the City: The Consultant shall provide, at a minimum, a fixed hourly all-inclusive rate for the position listed below and any other positions deemed necessary to effectively carry out the program. Consultants should not incur overtime charge unless prior written approval is obtained from the City.~~

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1	Project Executive	2080	Rate Per Hour		
2	Project Accountant	2080	Rate Per Hour		
3	Project Grants Consultant	2080	Rate Per Hour		
4	Project /Program Manager	2080	Rate Per Hour		
5	Policy and Procedures / Consultant (Short-term)	2080	Rate Per Hour		
6	Administrative Support	2080	Rate Per Hour		
7	Technical Consultant	2080	Rate Per Hour		

Submitted by:

 Name (printed)

 Signature

 Date

 Title

CHANGED TO:

Proposer Name: IEM International, Inc.

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: The Consultant shall provide, at a minimum, the maximum proposed all-inclusive rate for the positions listed below as deemed necessary to effectively carry out the program. Consultants should not incur overtime charge unless prior written approval is obtained from the City.



City of Fort Lauderdale • Procurement Services Division
 101 N.E. 3rd Ave., Suite 1650 • Fort Lauderdale, Florida 33301
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purchase@fortlauderdale.gov

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1	Project Executive	2080	Rate Per Hour	IEM designates confidentiality of the following material pursuant to Florida	
2	Project Accountant	2080	Rate Per Hour		
3	Project Grants Consultant	2080	Rate Per Hour		
4	Project /Program Manager	2080	Rate Per Hour		
5	Policy and Procedures / Consultant (Short-term)	2080	Rate Per Hour		
6	Administrative Support	2080	Rate Per Hour		
7	Technical Consultant	2080	Rate Per Hour		

Submitted by:

Keith Reynolds

Name (printed)

4/23/2025

Date

DocuSigned by:

964FBB635BAD47E...

Signature

Director, Contract Operations and Compliance

Title

All other terms, conditions, and specifications remain unchanged.

Yesenia Pascual
 Sr. Procurement Specialist

Company

IEM International, Inc.

(please print)

Name:

Keith Reynolds

Bidder's Signature:

DocuSigned by:

964FBB635BAD47E...

4/23/2025

Date: _____



NON-COLLUSION STATEMENT

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,


3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g., ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents, and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

<u>NAME</u>	<u>RELATIONSHIPS</u>
N/A	N/A
_____	_____
_____	_____
_____	_____
_____	_____

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

DocuSigned by:

 964FBB635BAD47E...

Authorized Signature

Keith Reynolds

Name (Printed)

Director, Contract Operations and Compliance

Title

4/15/2025

Date



**CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH
NON-DISCRIMINATION PROVISIONS OF THE CONTRACT**

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to City Ordinance Sec. 2-17(a)(i)(ii), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

- A. Contractors doing business with the City shall not discriminate against their employees based on the employee's race, color, religion, gender (including identity or expression), marital status, sexual orientation, national origin, age, disability, or any other protected classification as defined by applicable law.

Contracts. Every Contract exceeding \$100,000, or otherwise exempt from this section shall contain language that obligates the Contractor to comply with the applicable provisions of this section.

The Contract shall include provisions for the following:

- (i) The Contractor certifies and represents that it will comply with this section during the entire term of the contract.
- (ii) The failure of the Contractor to comply with this section shall be deemed to be a material breach of the contract, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.

DocuSigned by:

 964FBB635BAD47E...

 Authorized Signature

Keith Reynolds, Director, Contract Operations and Compliance

 Print Name and Title

4/15/2025

 Date



E-VERIFY AFFIRMATION STATEMENT

Solicitation/Bid /Contract No: 455

Project Description:


Community Development Block Grant Disaster Recovery (CDBG-DR)

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- A. all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- B. all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Contractor/Proposer/ Bidder Company Name: IEM International, Inc.

Authorized Company Person's Signature:  064FDB635BAD47E...

Authorized Company Person's Title: Keith Reynolds, Director, Contract Operations and Compliance

Date: 4/15/2025

AFFIDAVIT OF COMPLIANCE WITH FOREIGN ENTITY LAWS
(Florida Statute- §287.138, 692.201, 692.202, 692.203, and 692.204)

The undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury as follows:

1. Entity is not owned by the government of a foreign country of concern as defined in Section 287.138, Florida Statutes. (Source: § 287.138(2)(a), Florida Statutes)
2. The government of a foreign country of concern does not have a controlling interest in Entity. (Source: § 287.138(2)(b), Florida Statutes)
3. Entity is not organized under the laws of, and does not have a principal place of business in, a foreign country of concern. (Source: § 287.138(2)(c), Florida Statutes)
4. Entity is not owned or controlled by the government of a foreign country of concern, as defined in Section 692.201, Florida Statutes. (Source: § 288.007(2), Florida Statutes)
5. Entity is not a partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a foreign country of concern, as defined in Section 692.201, Florida Statutes, or a subsidiary of such entity. (Source: § 288.007(2), Florida Statutes)
6. Entity is not a foreign principal, as defined in Section 692.201, Florida Statutes. (Source: § 692.202(5)(a)(I), Florida Statutes)
7. Entity is in compliance with all applicable requirements of Sections 692.202, 692.203, and 692.204, Florida Statutes.
8. **(Only applicable if purchasing real property)** Entity is not a foreign principal prohibited from purchasing the subject real property. Entity is either (a) not a person or entity described in Section 692.204(1)(a), Florida Statutes, or (b) authorized under Section 692.204(2), Florida Statutes, to purchase the subject property. Entity is in compliance with the requirements of Section 692.204, Florida Statutes. (Source: §§ 692.203(6)(a), 692.204(6)(a), Florida Statutes)
9. The undersigned is authorized to execute this affidavit on behalf of Entity.

Name: Keith Reynolds Title: Director, Contract Operations and Compliance Entity: IEM International, Inc.

Signature:  Date: 4/15/2025

NOTARY PUBLIC ACKNOWLEDGEMENT SECTION

STATE OF Louisiana
COUNTY OF East Baton Rouge Parish

The foregoing instrument was acknowledged before me, by means of ☐ physical presence or ☐ online notarization, this 15 day of April, 2025, by Keith Reynolds, as

Director, Contract Operations and Compliance for IEM International, Inc., who is

☒ personally known to me or who has produced N/A as identification.

Notary Public Signature:  (Notary Seal)

Print Name: Brad Tiffie My commission expires: at death



Bradley Layne Tiffie
East Baton Rouge Parish, Louisiana
Notary Public
Commission No. 131454
My Commission Expires at Death



INNOEME-01

LHAMLET

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/31/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Alera Group 4325 Lake Boone Trail, Suite 200 Raleigh, NC 27607	CONTACT NAME: Lori F. Hamlet	
	PHONE (A/C, No, Ext): (919) 469-2473	FAX (A/C, No): (919) 467-4987
	E-MAIL ADDRESS: lhamlet@trisure.com	
	INSURER(S) AFFORDING COVERAGE	NAIC #
INSURED Innovative Emergency Management, Inc IEM International, Inc. 2801 Slater Rd, Ste 200 Morrisville, NC 27560	INSURER A : Charter Oak Fire Insurance Company (The)	25615
	INSURER B : Travelers Property Casualty Company of America	25674
	INSURER C : Travelers Casualty and Surety Company of America	31194
	INSURER D : Landmark American Insurance	33138
	INSURER E : Axis Insurance Company	37273
	INSURER F :	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC OTHER:			630 3R329314	10/1/2023	10/1/2024	EACH OCCURRENCE \$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000
							MED EXP (Any one person) \$ 10,000
							PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 2,000,000
							PRODUCTS - COMP/OP AGG \$ 2,000,000
							EMPLOYEE BENEFIT \$ 3,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			BA 3R329191	10/1/2023	10/1/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
							BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUP 3R389058	10/1/2023	10/1/2024	EACH OCCURRENCE \$ 10,000,000
							AGGREGATE \$ 10,000,000
							\$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below		N / A	UB 3R328606	10/1/2023	10/1/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER
							E.L. EACH ACCIDENT \$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Professional/Cyber			LCY852284	10/1/2023	10/1/2024	Limit 5,000,000
E	Excess Prof/Cyber			P00100124587301	10/1/2023	10/1/2024	Limit 5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Re: Operations of the Named Insured.

CERTIFICATE HOLDER

CANCELLATION

Insured's Copy
2801 Slater Rd, Ste 200
Morrisville, NC 27560-8477

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

Give form to the
requester. Do not
send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) IEM International, Inc.	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input checked="" type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions _____ <input type="checkbox"/>	
	5 Address (number, street, and apt. or suite no.). See instructions. 5420 Wade Park Blvd, Suite 140	Requester's name and address (optional)
6 City, state, and ZIP code Raleigh, NC 27607		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.


Social security number									
			-				-		
or									
Employer identification number									
7	2	-	1	0	4	5	8	8	4

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person 	Keith Reynolds Manager, Contract Administration	Date 1/23/2025
------------------	------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------	--------------------------

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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

Detail by Entity Name

Foreign Profit Corporation
IEM INTERNATIONAL, INC.

Filing Information

Document Number	F14000004924
FEI/EIN Number	72-1045884
Date Filed	11/18/2014
State	DE
Status	ACTIVE
Last Event	NAME CHANGE AMENDMENT
Event Date Filed	02/15/2024
Event Effective Date	NONE

Principal Address

5420 WADE PARK BLVD
STE 140
RALEIGH, NC 27607-4188

Changed: 03/04/2025

Mailing Address

P.O. BOX 110265
DURHAM, NC 27709-5265

Changed: 03/04/2016

Registered Agent Name & Address

INCorp SERVICES, INC.
3458 LAKESHORE DRIVE
TALLAHASSEE, FL 32312

Name Changed: 02/25/2016

Address Changed: 03/17/2023

Officer/Director Detail

Name & Address

Title Director

BERIWAL, MADHU
5420 WADE PARK BLVD
STE 140
RALEIGH, NC 27607-4188

Title Treasurer, CFO

SCHLEGEL, JOHN M
5420 WADE PARK BLVD
STE 140
RALEIGH, NC 27607-4188

Title Secretary, COO

TIFFEE, BRADLEY L
5420 WADE PARK BLVD
STE 140
RALEIGH, NC 27607-4188

Title President, CEO

KOON, BRYAN W
5420 WADE PARK BLVD
STE 140
RALEIGH, NC 27607-4188

Annual Reports

Report Year	Filed Date
2024	03/04/2024
2025	01/04/2025
2025	03/04/2025

Document Images

03/04/2025 -- AMENDED ANNUAL REPORT	View image in PDF format
01/04/2025 -- ANNUAL REPORT	View image in PDF format
03/04/2024 -- ANNUAL REPORT	View image in PDF format
02/15/2024 -- Name Change	View image in PDF format
01/04/2023 -- ANNUAL REPORT	View image in PDF format
01/04/2022 -- ANNUAL REPORT	View image in PDF format
01/04/2021 -- ANNUAL REPORT	View image in PDF format
01/02/2020 -- ANNUAL REPORT	View image in PDF format
01/02/2019 -- ANNUAL REPORT	View image in PDF format
01/02/2018 -- ANNUAL REPORT	View image in PDF format
01/10/2017 -- ANNUAL REPORT	View image in PDF format
03/04/2016 -- ANNUAL REPORT	View image in PDF format
02/25/2016 -- Reg. Agent Change	View image in PDF format
03/30/2015 -- AMENDED ANNUAL REPORT	View image in PDF format
01/23/2015 -- ANNUAL REPORT	View image in PDF format

11/18/2014 -- Foreign Profit	View image in PDF format
----------------------------------------------	------------------------------------------

Florida Department of State, Division of Corporations



City of Fort Lauderdale • Procurement Services Division
101 NE 3rd Ave., Suite 1650 • Fort Lauderdale, Florida 33301
954-828-5933 Fax 954-828-5576
purchase@fortlauderdale.gov

ADDENDUM NO. 1

RFP No. 455

TITLE: Community Development Block Grant Disaster Recovery (CDBG-DR)

ISSUED: April 10, 2025

This addendum is being issued to make the following change(s):

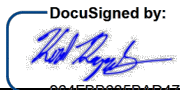
1. Bid Start Date: April 03, 2025
Bid End Date: April 17, 2025, 2:00 PM EST
~~Q & A End Date: April 14, 2025, 5:00 PM EST~~
Bid Contact: Yesenia Pascual Sr. Procurement Specialist
954-828-5257
ypascual@fortlauderdale.gov

Q & A Close date has been changed to **APRIL 15, 2025**, at 5:00 PM.

All other terms, conditions, and specifications remain unchanged.

Yesenia Pascual
Sr. Procurement Specialist

Company Name: IEM International, Inc.

Bidder's Signature:  (please print)
904FBB035BAD47E...

Date: 4/15/2025



City of Fort Lauderdale • Procurement Services Division
101 N.E. 3rd Ave., Suite 1650 • Fort Lauderdale, Florida 33301
954-828-5933 Fax 954-828-5576
purchase@fortlauderdale.gov

ADDENDUM NO. 2

RFP EVEN No. 455

**TITLE: COMMUNITY DEVELOPMENT BLOCK GRANT DISASTER RECOVERY
(CDBG-DR)**

ISSUED: APRIL 15, 2025

This addendum is being issued to make the following change(s):

- 1. The opening date has been changed to April 24, 2025, at 02:00 PM.**
- 2. FY 2025 City Commission Priorities document has been attached to this addendum.**
- 3. Sample Agreement Section 6, Method of Billing and Payment**

CHANGE FROM:

Consultant may submit invoices for compensation no more often than monthly, but only after the services for which the invoices are submitted have been completed. An original invoice plus one copy are due within fifteen (15) days of the end of the month except the final invoice which must be received no later than sixty (60) days after this Agreement expires. Invoices shall designate the nature of the services performed and/or the goods provided.

The payments will be made at intervals as described above upon successful completion of deliverables. ~~The Final payment will not be made until the consolidated plan has been submitted and approved by HUD~~

City shall pay Consultant within forty-five (45) days of receipt of Consultant's proper invoice, as provided in the Florida Local Government Prompt Payment Act

To be deemed proper, all invoices must comply with the requirements set forth in this Agreement and must be submitted on the form and pursuant to instructions prescribed by the City's Contract Administrator. Payment may be withheld for failure of Consultant to comply with a term, condition, or requirement of this Agreement.

Notwithstanding any provision of this Agreement to the contrary, City may withhold, in whole or in part, payment to the extent necessary to protect itself from loss on account of inadequate or defective work that has not



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been remedied or resolved in a manner satisfactory to the City's Contract Administrator or failure to comply with this Agreement. The amount withheld shall not be subject to payment of interest by City.

CHANGED TO:

Consultant may submit invoices for compensation no more often than monthly, but only after the services for which the invoices are submitted have been completed. An original invoice plus one copy are due within fifteen (15) days of the end of the month except the final invoice which must be received no later than sixty (60) days after this Agreement expires. Invoices shall designate the nature of the services performed and/or the goods provided.

The payments will be made at intervals as described above upon successful completion of deliverables.

City shall pay Consultant within forty-five (45) days of receipt of Consultant's proper invoice, as provided in the Florida Local Government Prompt Payment Act

To be deemed proper, all invoices must comply with the requirements set forth in this Agreement and must be submitted on the form and pursuant to instructions prescribed by the City's Contract Administrator. Payment may be withheld for failure of Consultant to comply with a term, condition, or requirement of this Agreement.

Notwithstanding any provision of this Agreement to the contrary, City may withhold, in whole or in part, payment to the extent necessary to protect itself from loss on account of inadequate or defective work that has not been remedied or resolved in a manner satisfactory to the City's Contract Administrator or failure to comply with this Agreement. The amount withheld shall not be subject to payment of interest by City.

4. Solicitation Document VI- Cost Proposal Page

CHANGE FROM:

Proposer Name: _____

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.



City of Fort Lauderdale • Procurement Services Division
 101 N.E. 3rd Ave., Suite 1650 • Fort Lauderdale, Florida 33301
 954-828-5933 Fax 954-828-5576
purchase@fortlauderdale.gov

~~Cost to the City: The Consultant shall provide, at a minimum, a fixed hourly all-inclusive rate for the position listed below and any other positions deemed necessary to effectively carry out the program. Consultants should not incur overtime charge unless prior written approval is obtained from the City.~~

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1	Project Executive	2080	Rate Per Hour		
2	Project Accountant	2080	Rate Per Hour		
3	Project Grants Consultant	2080	Rate Per Hour		
4	Project /Program Manager	2080	Rate Per Hour		
5	Policy and Procedures / Consultant (Short-term)	2080	Rate Per Hour		
6	Administrative Support	2080	Rate Per Hour		
7	Technical Consultant	2080	Rate Per Hour		

Submitted by:

 Name (printed)

 Signature

 Date

 Title

CHANGED TO:

Proposer Name: _____

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: The Consultant shall provide, at a minimum, the maximum proposed all-inclusive rate for the positions listed below as deemed necessary to effectively carry out the program. Consultants should not incur overtime charge unless prior written approval is obtained from the City.



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 Date

 Title

All other terms, conditions, and specifications remain unchanged.

Yesenia Pascual
 Sr. Procurement Specialist


Company

 IEM International, Inc.

Name:

 (please print)

Bidder's Signature:

DocuSigned by:

 964FBB635BAD47E...

 Keith Reynolds, Dir. of Contract Operations

Date: 04/18/2025

FY 2025 Adopted Commission Priorities

PRIORITY	FUNDED ITEMS (★ Newly funded initiatives)
PUBLIC SAFETY	★The Fire Rescue Department budget includes approximately \$565,000 for the addition of five (5) positions which will add a third firefighter/paramedic to one Medical Rescue Unit beginning in April 2025.
	★The Police Department budget includes \$100,000 to create a Recruitment and Retention Incentive Program which will provide financial incentives to employees and homeowner associations as well as a hiring bonus for new police officers who complete their probation period.
	★The Police Department budget includes approximately \$175,000 to establish a School Zone Speed Enforcement Camera Program which will install automated speed detection systems in school zones for four schools.
	★A police focused public safety survey is funded in the amount of approximately \$48,300 to better understand the perception and satisfaction with the City's police and public safety efforts.
	The CIP includes \$81.9 million of unspent project balance for the Police Headquarters Replacement Project.
	The Police Department budget includes approximately \$714,000 for the replacement of police equipment such as ballistic vests and license plate readers.
	The Police Department budget continues to fund the staffing of the Real Time Crime Center in the amount of approximately \$407,000.
	The Police Department budget includes \$344,000 for the continuation of the ShotSpotter Program.
	The Fleet Services budget includes \$9.0 million for the replacement of 86 Public Safety vehicles, per the vehicle replacement schedule, including six Fire Rescue apparatuses.
	The Fire Rescue Department budget includes approximately \$4.3 million for the replacement of equipment such as extrication equipment and bunker gear.
	The CIP includes \$250,000 of unspent project balance for a temporary trailer to serve as the Ocean Rescue Headquarters.
	The CIP includes approximately \$196,000 for the replacement of lifeguard towers as well as approximately \$222,000 of unspent project balance.
HOMELESSNESS INITIATIVES	★The City Manager's Office budget includes \$330,000 for Shelter Bed Access Program which would provide temporary shelter for neighbors experiencing homelessness for a period of up to 60 days.
	The Neighbor Support Division budget includes approximately \$315,260 to continue the Housing Navigation Program in partnership with the Taskforce Fore Ending Homelessness.
	The Neighbor Support Division budget includes approximately \$204,384 for the continuation of the Community Court Program which includes one (1) position and helps individuals receive services tailored to their needs, and link participants to restitution projects and onsite social services and treatment providers.
	The Police Department continues its efforts toward homeless support in the amount of approximately \$1.1 million through the General Fund for the Homeless Outreach Unit and Reunification Travel Voucher Program.
	The Homeless Intervention Administrator position continues to be funded by the City Manager's Office in the amount of approximately \$133,022.

FY 2025 Adopted City Commission Priorities, continued

PRIORITY	FUNDED ITEMS (★ Newly funded initiatives)
HOMELESSNESS INITIATIVES	The Fire Rescue Department Budget includes \$310,281 to continue the Mobile Integrated Health Program – Homeless Action Team which connects high utilizers (911 callers with three or more logged calls annually) to public and private resources.
	Entitlement grant funding will continue to support homelessness initiatives and is managed by the Housing and Community Development Division: <ul style="list-style-type: none"> o Community Development Block Grant (CDBG) funding will provide approximately \$226,000 to support local organizations' homelessness assistance and prevention programs. o HOME Investment Partnerships - American Rescue Plan funding will provide \$2.1 million to be used in part to assist those experiencing homelessness and to prevent homelessness. o State Housing Initiative Partnership funding will provide \$1.4 million to be used in part to assist to those experiencing homelessness and to prevent homelessness.
AFFORDABLE HOUSING AND ECONOMIC DEVELOPMENT	Entitlement grant funding will continue to support housing opportunity initiatives and is managed by the Housing and Community Development Division: <ul style="list-style-type: none"> o HOME Investment Partnerships funding will provide approximately \$202,000 to be used in part to support affordable housing initiatives. o Housing Opportunities for Persons with AIDS (HOPWA) funding will provide \$7.6 million to assist with facility-based housing, various rent programs, mortgage assistance, and utilities.
	The Community Redevelopment Agency budgets includes approximately \$18.9 million to fund incentive programs to attract new businesses and encourage economic development. Another \$70,000 is included to advertise and promote the incentive programs.
	The Public Affairs Division of the City Manager's Office is funded in the amount of approximately \$1.4 million, which includes funding to attract new and support existing businesses including Qualified Target Industry (QTI) Tax Refunds and Economic Development Incentives.
	The Development Services Department budget includes \$48,000 for 3D development mapping.
	The CIP includes \$4.0 million in unspent balances for the replacement of City Hall.
	TRANSPORTATION AND TRAFFIC
TRANSPORTATION AND TRAFFIC	The CIP includes \$3.5 million for the repair and maintenance of asphalt, roadways, and sidewalks, in addition to \$870 thousand to expand sidewalk access within the City.
	★ The Transportation and Mobility Department budget includes \$45,000 to improve the safety at the intersection of Las Olas and SE 2nd Avenue with the implementation of signs and markings.
	★ The Transportation and Mobility Department budget includes approximately \$376,000 to provide for a security presence at the Performing Arts Center Parking Garage as well as to complete a structural assessment.
	The CIP includes \$3.5 million for the repair and maintenance of asphalt, roadways, and sidewalks, in addition to \$870 thousand to expand sidewalk access within the City.
	The CIP includes \$6.0 million in unspent project balances to continue the implementation of the Las Olas Mobility Plan.
	The Transportation and Mobility Department budget includes \$1.7 million in ongoing funding to enhance the City's Microtransit Program.
	The CIP includes approximately \$92,828 of unspent project balance for traffic flow improvements as well as \$80,000 for the Riverside Park Traffic Calming Project.
	Transportation and Mobility Department General Fund budget includes approximately \$61,000 for Bluetooth sensors that collect traffic data for analysis.

FY 2025 Adopted City Commission Priorities, continued

PRIORITY	FUNDED ITEMS (★ Newly funded initiatives)
TRANSPORTATION AND TRAFFIC	The Transportation and Mobility Department General Fund budget includes \$50,000 to continue the Speed Radar Program to collect traffic data for potential synchronization improvements.
	★ The Transportation and Mobility Department budget includes funding to enhance parking enforcement, specifically in the Flagler Village area; this enhancement is expected to be cost neutral due to additional parking revenues.
INFRASTRUCTURE AND RESILIENCE	The CIP includes \$41.2 million in cash funded Stormwater Fund capital projects.
	Approximately \$158,000 is included in the Public Works Department budget for a senior project manager to manage the construction of the new Prospect Lake Water Treatment Plant.
	The CIP includes \$51.1 million in unspent project balances for advanced metering infrastructure which will improve water billing accuracy, provide advanced tools for monitoring, and remotely turn off and on services. The Public Works Department budget includes approximately \$1.0 million for the operation and maintenance of the new advanced water meter infrastructure.
	The CIP includes \$484,100 in funding for the restoration and replacement of seawalls as well as \$2.0 million of unspent project balance.
	The Public Works Department will address water quality through the following initiatives: <ul style="list-style-type: none"> o The Public Works Department Water & Sewer Fund budget includes \$136,458 in funding for the Waterway Quality Monitoring Program. o The Public Works Department budget includes \$398,000 for the Canal Cleaning Program.
	The Water/Sewer Revenue Bond was issued in FY 2018 in the amount of \$200 million to fund priority projects; another \$200.0 million was issued in FY 2024 for consent order and other priority water and sewer infrastructure projects. Many of these projects have a multi-year implementation cycle and are ongoing. The Community Investment Plan (CIP) includes over \$36.9 million remaining to be appropriated from the bond funding.
	The CIP Water/Sewer Master Plan includes \$30.0 million in new cash funded capital projects in addition to over \$83.2 million in unspent project balances. The Central Region Wastewater budget includes \$19.8 million in new cash funded capital projects prioritized based upon a renewal and replacement study in addition to over \$65.0 million in unspent project balances.
	The CIP includes \$157.3 million in unspent project balances for the enabling works needed to connect the City's existing water system to the new Prospect Lake Clean Water Center.
	Design work is underway to support the first tranche of Stormwater improvements in eight (8) neighborhoods, as part of the Fortify Lauderdale program, with the issuance of a Stormwater Bond to support construction planned for FY 2026.
	The CIP includes \$3.8 million for a condition assessment of the City's Watershed Asset Management Plan (WAMP) as well as \$3.8 million of unspent project balance. Additionally, the Public Works Department Stormwater Operations budget includes \$1.3 million to support asset inventory improvements and implementation of the WAMP.
	★ The Public Works Department budget includes approximately \$168,000 for a Resilience Outreach Coordinator.
	★ The Public Works Department budget includes approximately \$678,000 for an additional six (6) positions who will manage the construction of new stormwater infrastructure.

FY 2025 Adopted City Commission Priorities, continued

PRIORITY	FUNDED ITEMS (★ Newly funded initiatives)
INFRASTRUCTURE AND RESILIENCE	★ The Public Works Department budget includes \$2.8 million to enhance maintenance of stormwater infrastructure following the addition of new stormwater assets.
	★ The Public Works Department budget includes \$3.0 million to develop an updated Comprehensive Water and Sewer Masterplan.
	★ The City Manager's Office budget includes approximately \$161,000 for the addition of a Chief Waterways Officer.
	The CIP includes \$8.4 million for the repair and replacement of bridges as well as \$2.8 million of unspent project balances.
PUBLIC SPACES AND COMMUNITY INITIATIVES	The Development Services Department budget includes approximately \$267,000 for planning and administration of the Historic Preservation Program funded by the General Fund.
	★ Nonprofit organization funding will continue to support the Fort Lauderdale Historic Society, Inc. in the amount of \$85,000 which contributes to the City's historical life and serves as a resource within the Riverwalk Arts and Entertainment District. Additionally, \$100,000 has been included for improvements to the building being used by the Fort Lauderdale Historic Society, Inc.
	The Development Services Department budget includes approximately \$5.4 million for the enforcement of code concerns, including vacation rental regulations.
	Entitlement grant funding, in the amount of approximately \$907,000, will be used in part to proliferate access to internet in low-income neighborhoods.
	★ The City continues to fund a Chief Education Officer to improve education within the City in the amount of approximately \$139,000. Additionally, \$15,000 is being included for a Teachers of the Year commemoration.
	The CIP includes approximately \$2.8 million in unspent project balances for the Galt Ocean Mile beautification project.
	The CIP includes \$1.9 million for the repair and maintenance of City-owned facilities as well as \$3.5 million of unspent project balances.
	The Parks and Recreation Department budget includes \$23.5 million for the maintenance of parks and medians and Citywide tree services.

**Some of these projects have elements that are components of other programs and initiatives; as such, the funding identified above may extend to multiple Commission Priorities.*