



Nassau County, Florida

Proposal for Program State Housing Initiatives Partnership Program Administration Services

December 6, 2023

Submitted by:
Anser Advisory Consulting, LLC
Robert Sheets, Executive VP
robert.sheets@anseradvisory.com
1500 Mahan Drive, Suite 250
Tallahassee, Florida 32308
T 850-681-3717 | F 850-224-7206

TAB 1 – COVER LETTER

December 6, 2023



Marshall Eyerman
Nassau County
96135 Nassau Place
Yulee, FL 32097

RE: Program State Housing Initiatives Partnership Program Administration Services

Mr. Eyerman

Anser Advisory (Anser) is pleased to submit our proposal to Nassau County, Florida for Program State Housing Initiatives Partnership (SHIP) Program Administration Services. We have brought together a Team of highly experienced and seasoned professionals that bring strategy and management consulting services to clients like Nassau County to best leverage this significant opportunity to affect meaningful short-term outcomes as well as long-term growth. In our response, we have demonstrated our Team's capabilities, capacity, and direct relevant experience to provide meaningful and value-added services to the County in a timely manner.

Since **1996**, Anser has served hundreds of counties and cities, providing advisory and management services in various capacities, giving us a deep understanding of the responsibilities faced by the County's leadership and department teams in delivering projects and programs with limited funding. We also understand the degree of funding shortfalls for cities and other municipalities across the nation, and how critical it is to be able to leverage grant funding to meet the objectives of both the County and the community. We have supported various recovery efforts for public sector clients (American Rescue Plan Act (ARPA), Coronavirus Aid, Relief, and Economic Security Act (CARES), Federal Emergency Management Agency (FEMA), American Reinvestment & Recovery Act, Community Development Block Grant (CDBG), SHIP, Economic Development, and Broadband).

Our approach builds upon the County's progress to date. We will "hit the ground running" and do not require "learning as we go." Over the past decade, our team members have supported various public agencies with successful grant program administration that has yielded multiple successes and financial awards. Our approach to these services will begin by understanding the County's needs and resources and to gain a full understanding of the current program. It will combine the critical aspects of traditional management consulting methodologies, combined with our institutional knowledge of the SHIP program, to perform a full evaluation of the current processes and outcomes, and provide recommendations to help improve program efficiency, mitigate risk, and ensure compliance with all local and state guidelines.

We are currently assisting over thirty (30) local governments in administering similar grant programs, including over twenty (20) in the State of Florida alone, including:

- Jefferson County, Florida
- Madison County, Florida
- Taylor County, Florida
- Wakulla County, Florida
- Highlands County, Florida
- City of Deerfield Beach, Florida
- City of Dania Beach, Florida
- City of North Lauderdale, Florida

Having successfully delivered grants administration services across disaster relief, grant management, program management, auditing, compliance advisory, and programming for capital and social programs, we are ready to start immediately and positively impact the County's program. We believe the relevant experience in our response aligns with the County's requests. We have overseen and delivered billions of dollars' worth of capital projects and financial compliance services. We understand the imperatives around federal and state compliance to avoid clawback, the nuance of working with public infrastructure and social programs, and how those projects can be best set up for success. We would be proud to serve the County and these critical community investments. In our proposal, we have highlighted a few of our proposed Team's prior accomplishments, including:

- Recommendation and assistance in implementing program enhancements, program staffing needs, or service alternatives.
- Helping hundreds of government executive leaders, policymakers, and managers with improving their respective agency's management, organizational structure, and operations.
- Management of comprehensive stakeholder engagement and communication plans for several billion dollars' worth of capital improvement plans.
- Managing extensive large-scale Federal programs including clients like Will County, IL (\$130+ million ARPA allocation), City of Scranton, PA (\$65+ million ARPA allocation) and the City of Gainesville, FL (\$50+ million ARPA Allocation), City of Everett, MA (\$40+ million), and Town of Randolph, MA (\$20+ million).

At our core, we are a diverse Team comprised of certified accounting professionals (CPAs), attorneys, grant managers, project managers, pre-construction advisors, engineers, architects, and other specialist subject matter experts. We are each individually and collectively experts in supporting public clients, navigating competing interests within project environments, and driving productive efforts towards the strategic goals of and for our clients. This means that evaluation and assessment services delivered by the Team are equally attuned to the needs of the County.

Our extensive knowledge of the SHIP Program, ARPA, Infrastructure Investment and Jobs Act (IIJA), available broadband funding, Community Development Block Grant (CDBG) funding, and other State grant programs allows us to understand that there is plenty of work to be completed to position the County for timely success for existing and future projects. Our ties throughout the State of Florida and other states are strong. Our mission is to provide high-quality services to help the communities we live in to utilize the Federal and State grants to deliver benefits to the community.

We sincerely appreciate your consideration, and we look forward to furthering this initiative with you. Should you have any questions or concerns, please do not hesitate to contact **Robert Sheets at 850-681-3717**.

Sincerely,



Robert Sheets

Executive Vice President

1500 Mahan Dr, Suite 250

Tallahassee, FL 32308

Robert.Sheets@anseradvisory.com

850.681.3717

TAB 2 – TABLE OF CONTENTS

Contents

Cover Letter1

Knowledge and Qualification4

Our Experience5

Proposed Planners.....8

Delivery and Approach9

References 12

Technology..... 15

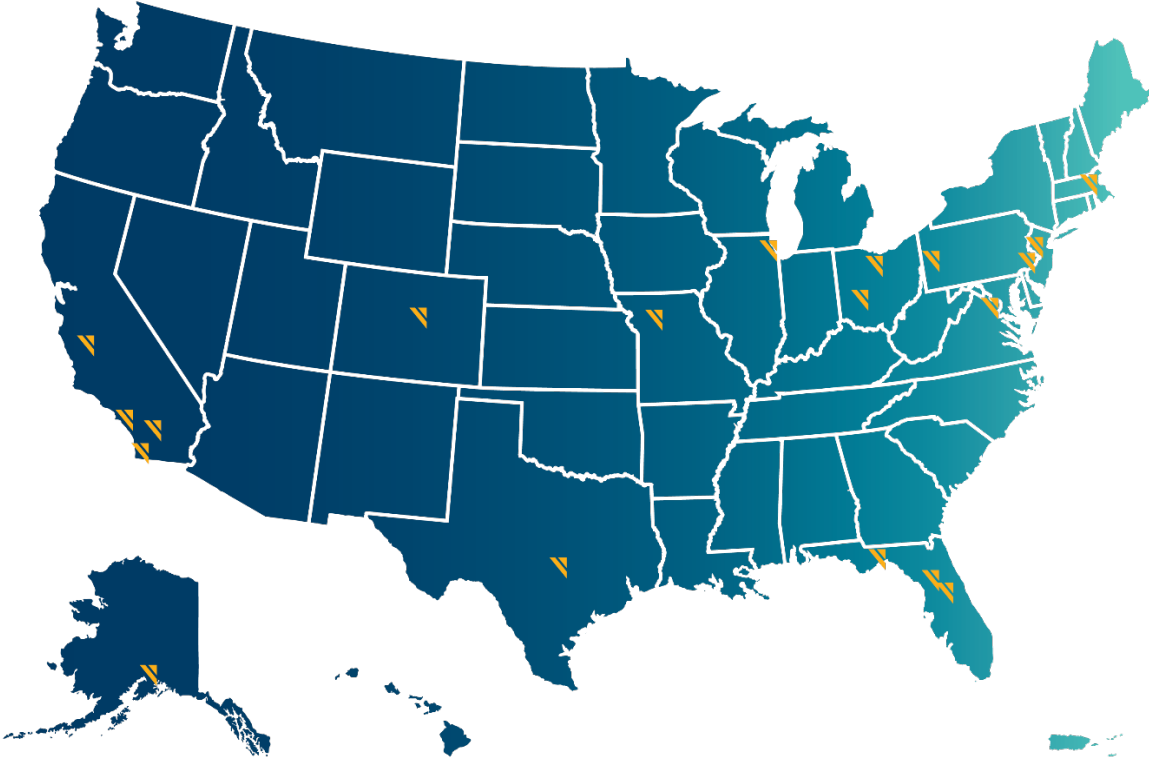
Cost Proposal 16

Attachments/Administrative Information 16

TAB 3 – KNOWLEDGE AND QUALIFICATIONS

Knowledge and Qualification

Anser Advisory is a national program management and advisory firm that provides high-quality solutions to our client's challenges. Our services begin with strategic organizational planning and continue by managing each project's execution and compliance. With a diverse client base, our Team is adept at adding value to early program development through creativity and critical thinking. We dive into projects at any development cycle phase, with a crucial focus on driving value and maximizing accountability. We are unconventional as a firm because we believe in honoring old-school traditions while leveraging new-school methods. This is our value proposition to you.



We deliver upon this value proposition by bringing world-class people together in a nationally recognized Great Place to Work™ with the management and technology infrastructure to continually offer clients deep expertise, sector-specific experience, and rapid deployment of project resources. Our business is structured around three main service lines, each of which will be brought together for this assignment, leveraging relevant Anser resources from across the board:

- ▼ **Advisory:** including organizational development, change management, program controls, estimating, alternative delivery, and finance, including public-private partnership expertise, assurance, and auditing.
- ▼ **Strategy, Grants, and Compliance:** Pre-award, award, and post-award grant management services inclusive of research, estimating, grant writing, contract review and negotiation, reimbursement requests submissions, reporting, tracking, and monitoring and any audit support as needed, *and*
- ▼ **Management:** program and project management, construction manager-agency services, and complete owner's representative roles.

In November 2021, Anser acquired Government Services Group (GSG), a Florida-based company that provides various services, including ARPA Grants management, disaster recovery, grant management, construction management, capital project administration, and program administration. Anser supports its clients with expertise in ARPA, FEMA, and CDBG Disaster Recovery (CDBG-DR) eligibility determination; project management; appeals preparation; grant management; financial recovery; financial and project progress reporting; grant monitoring and compliance; grant closure and audit preparation, defense, and appeals. Anser specializes in management support services in capital program management, water/wastewater utility operations, capital financing, bond issue compliance, contractual performance oversight, financial administration, full-service governmental accounting, utility customer service, billing services, and city and county property services. Anser has delivered value-added Non-Ad Valorem Assessment services to various Florida clients since 1996. We have demonstrated our approach to client services, collaborative process, and desire to exceed your expectations. Our expertise is derived from the project and program managers, management consultants, estimators, schedulers, financial analysts, procurement specialists, grant managers, system configuration specialists, architects, engineers, construction managers, certified professional accountants, and construction auditors who represent the Anser brand.

We are headquartered in Santa Ana California and operate nationally from regional offices in thirteen (13) states with a diverse and talented staff of over 1,200 professionals nationwide. Anser has experienced team members across 3 local Florida offices including Longwood, Ocoee, and Tallahassee. The Ocoee office consists of over seventy (70) professionals and will be the main office to provide the services under the contract. This office will be further supported by professionals throughout the state.

Our Experience

We believe that the combination of our firm-level specific grant experience and the hands-on experience of our personnel allow our Team to develop enhanced solution-based strategies to address the County's diverse governance and stakeholder hurdles. As such, our Team combines and offers the best options, alternatives, and innovative solutions, particularly related to government funding management, project management, grant research, grant proposal development and review, grant management, grant monitoring, reporting, and compliance.

Florida State Housing Initiatives Partnership (SHIP) Program

Anser has managed Florida's SHIP program for multiple counties for many years. For the last decade, we have been a trusted partner to local governments to effectively administer SHIP funding for the following Counties:

- Taylor County, FL
- Jefferson County, FL
- Wakulla County, FL

We are confident that our experience in administering these programs gives us the knowledge and experience needed to properly evaluate the County's program and provide recommendations to the County to help the program have the largest impact possible on the community.

Community Development Block Grants (CDBG)

Anser has provided grant management and administration for CDBG funding opportunities for local governments throughout the state of Florida for over fifteen (15) years, including:

- Alachua County, FL
- Charlotte County, FL
- Desoto County, FL
- Dixie County, FL
- Gadsden County, FL
- Levy County, FL
- Madison County, FL
- Monroe County, FL
- Taylor County, FL
- Jefferson County, FL
- St. Lucie County, FL
- Citrus County, FL
- Wakulla County, FL
- City of Alachua, FL
- City of Center Hill, FL
- City of Chattahoochee, FL
- City of Hampton, FL
- City of Homestead, FL
- City of Inverness, FL
- City of Key West, FL
- City of Lake Butler, FL
- City of Lake Wales, FL
- City of Marathon, FL
- City of Margate, FL
- City of Newberry, FL
- Town of Inglis, FL
- Town of Juniper, FL
- Town of Malone, FL
- Town of Worthington Springs, FL
- Village of Islamorada, FL

To address the differing needs of local governments, Anser routinely provides our Grant Services clients with the following services:

Housing Rehabilitation: Assist with securing and administering federal and state programs to rehabilitate homes for low-to-moderate-income households. Programs include the Community Development Block Grant (CDBG) Program, Neighborhood Stabilization Program, State Housing Initiative Program, and the Housing Choice Voucher (HCV) Program, formerly known as Section 8.

Neighborhood Revitalization: Assist with securing and managing state and federal grant and loan programs for infrastructure improvements and developments for low-to-moderate-income residential communities. Activities include, but are not limited to water, wastewater, sidewalks, and beautification programs.

Economic Development: Establish public/private partnerships to attract businesses to locate and/or expand in a particular community. Economic Development includes planning, securing much-needed resources for local communities, and funding infrastructure development programs and incentive packages for businesses' job creation.

Commercial Revitalization: Development of applications for Housing and Urban Development (HUD) CDBG Grant funding for limited rehabilitation and Façade improvements for designated downtown commercial areas.

Disaster Recovery: Comprehensive assistance to governmental entities for the implementation of large-scale federal disaster recovery programs such as the CDBG-DR Initiatives. Disaster Recovery projects include rehabilitation and housing replacement, rehabilitation of single-family and multi-family housing units, infrastructure, public facilities, and Affordable Housing.

Construction Management and Inspection: Construction inspection in the areas of federal and state-funded housing and infrastructure projects to ensure grant-related construction requirements are met. Also included are all services necessary to procure construction contractors, preparation of bid documents, bid construction contracts, and manage construction contracts once awarded.

Intake and Eligibility: Assist governmental entities and private businesses serving governmental entities in the analysis of grant participants for eligibility in receiving grant assistance from federal and state programs in areas such as housing rehabilitation and disaster recovery. Also included is project analysis to ensure it meets all federal and state grant requirements for funding.

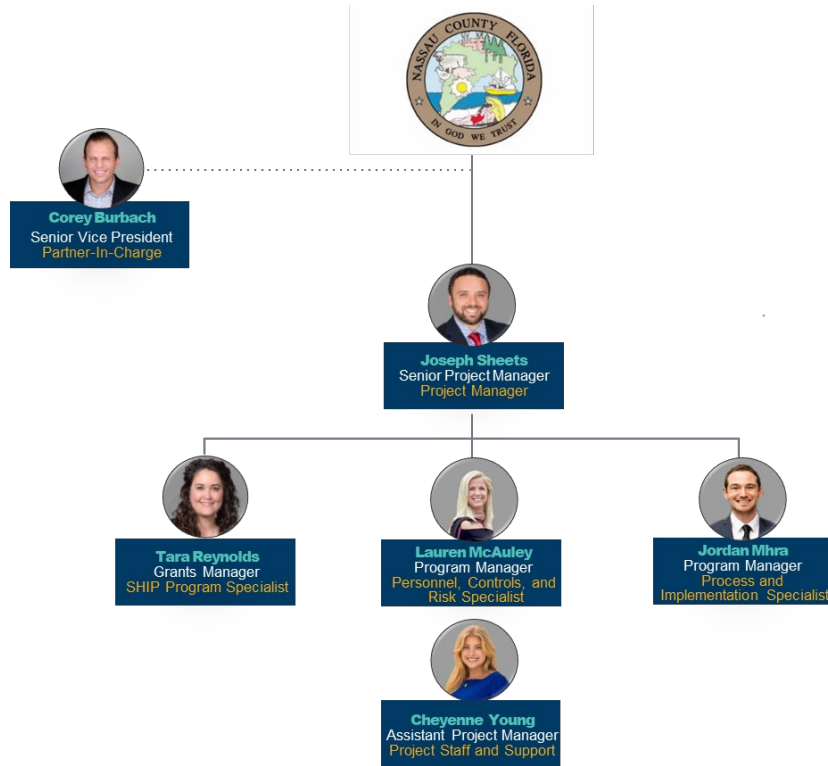
Environmental Review: Assist with preparation of documents or oversight of contractors providing environmental review services necessary to receive a Finding of No Significant Impact for federally funded grant programs.

Davis-Bacon Labor Standards: Provide services necessary to ensure compliance with this standard on federally funded construction contracts. Services include, but are not limited to, ordering wage decisions, adding additional job classifications when needed, review of certified payrolls, on-site employee interviews, providing technical assistance to contractors, developing corrective action plans, and ensuring all Davis-Bacon Labor Standard documents are included in bid documents.

TAB 4 – PROPOSED PLANNERS

Proposed Planners

Our Team's diverse experience brings a full suite of complementary skills to the County. We have been providing a full spectrum of Grant Services from inception to close out for over 25 years – specifically, services funded by the State of Florida, (SHIP, Department of Environmental Protection's (DEP) Septic Upgrade Incentive Program) Federal Emergency Management Agency Public Assistance (FEMA PA), U.S. Treasury, and Community Development Block Grant Disaster Recovery (CDBG-DR) programs. We have the right resources and Federal and State grant experience when you need them. We have included the resumes for our leadership Team, to further demonstrate the experience we bring to the communities we serve.



Members of the Team are experienced in:

- ARPA, CARES, CDBG, SHIP and other Federal/State Grants Management programs
- Developing standard applications and approval processes
- Program management, assessment, change management, and implementation
- Application evaluation and support for individual, small business, and non-profits
- Evaluating requests and recommending funding options for the County's consideration
- Submission of Federal/State Reporting, program monitoring, Quality Assurance



COREY BURBACH

SENIOR VICE PRESIDENT

ANSER
ADVISORY

EDUCATION

Bachelor of Science, Business
Economics, University of
Arizona, Tucson, AZ

LICENSES / CERTIFICATIONS

Series 50: Municipal Advisor
Representative

EXPERIENCE

Years of Experience:

10

Years with Firm:

1

Corey Burbach is a results-oriented financial and program management professional with ten years of experience specializing in facilities planning, management and funding. He provides a wide variety of facility services to help school districts across the United States with their facility options. As a registered Financial Advisor, Corey understands the financing side of school facilities planning. He performs various analyses relating to facility assessments, long-range facilities master plans and implementation, and educational adequacy. Corey has focused on ESSER and program management for municipalities since the onset of the pandemic.

His deep experience in the public sector advisory offers him ability to help municipalities plan and execute on their financing and capitol programming needs. Corey developed pro forma and funding models for identified capital projects and created customized solutions based on the needs of the client. He identified and developed refunding strategies to reduce outstanding debt obligations for existing clients and business development efforts. As a facility planning consultant, he developed a new service for school districts looking to successfully reopen during the pandemic which adhering to the guidelines established by the Educational Agency.

REPRESENTATIVE EXPERIENCE

Will County, American Rescue Plan Act Consulting, Will County, IL

Corey is managing the implementation of Will County's \$134 million allocation of ARPA. Anser, in conjunction with the County is engaging with local units of government, non-profits, healthcare partners, small businesses and community partners to facilitate the Will County Comeback program, an investment in 5 Pillars: Health, Infrastructure, Unmet Needs, Economic Development, and Revenue Replacement.

City of Scranton, American Rescue Plan Consulting Services, Scranton, PA

Corey is part of the team that is providing American Rescue Plan (ARP) Pre-implementation, Implementation, and monitoring, compliance, and reporting services for the City's \$68M ARP spending plan. The team has assisted the City in developing its project and program list and conducted a compliance and alternate funding analysis to help determine eligibility and highest and best use of ARP dollars. The team is continuing to review the City's infrastructure project procurement packages, contractor selections, and contracting terms to confirm they are in alignment with 2 CFR 200 requirements and assist the City with quarterly reporting back to Treasury. Additionally, the Anser team is assisting in the development of the City's community grant programs that are designed to assist impacted small businesses, nonprofits, households and residents.

Brentwood Union School District, Facility Program Management, Brentwood, CA

Serving the role of Facility Program Manager, Corey oversaw the team that led the development of the District's 10-year capital improvement plan. The District was in the process of building a new K-8 school, in which security specifications were developed in conjunction with the design team. Corey led the process of evaluating security options such as check-in procedures, vestibules, gated grounds, and campus layout.



JOSEPH SHEETS

FEDERAL FUNDING
COMPLIANCE LEAD
SENIOR PROGRAM MANAGER

ANSER
ADVISORY
Part of **Accenture**

EDUCATION

Bachelor of Arts, University of
Central Florida, Orlando, FL

Master of Business
Administration, University of
Central Florida, Orlando, FL

EXPERIENCE

Years of Experience:

8

Years with Firm:

2

Joseph Sheets is a Senior Project Manager specializing in Federal and State grant programs. Joseph currently oversees all grant initiatives in the Southeast U.S. for Anser's Strategy, Grants, & Compliance team, totaling over \$200 million in Federal and State assistance. He has assisted over 30 local governments across the United States in navigating the complexities of Federal grant initiatives. In leading his team through management of American Rescue Plan Act, Infrastructure Investment and Jobs Act, Community Development Block Grant, Florida's Septic Upgrade Incentive Program, and other grant programs, he has created nationally adapted processes for grants management. He brings 12 years of transformative leadership in the private sector, where he innovated dynamic solutions to modern business challenges. This experience allows him to provide private sector solutions to public sector challenges, maximizing value

REPRESENTATIVE EXPERIENCE

City of North Lauderdale, American Rescue Plan Consulting Services, North Lauderdale, FL

Joseph serves as the Project Leader for Anser's assistance with North Lauderdale's \$22 million of American Rescue Plan Act programs. Our team provided project risk analysis and performed a needs assessment for the City, helping to create a robust selection of projects to provide a sustained economic impact to its residents. In addition to overseeing the implementation of millions of dollars in critical infrastructure upgrades, Anser is now acting as program managers for the Residential Home Repair (RHR), Home Weatherization, Small Business and Non-Profit Assistance programs, assisting with program guidelines, application design and intake, eligibility determinations, duplication of benefits verification, and disbursement of funds.

Lee County School District, FL, FEMA Public Assistance (PA) Grant Program and Construction Program Management

Joseph played an integral role in standing up Anser's project team for their work overseeing the Lee County School District's permanent repairs as they recovered from the devastating effects of Hurricane Ian. As a Senior Project Manager, Joseph facilitated the team's efforts as they inventoried and analyzed over 1700 service requests from damaged facilities, created SOPs for internal and external stakeholders compliant with FEMA's PAPPG, and helped manage resources for a 12 FTE project team.

City of Everett, MA, Public Assistance (PA) Grant Program & American Rescue Plan Act (ARPA)

Anser Advisory has been providing Public Assistance Grant program management to the City of Everett, MA for the COVID-19 federally declared disaster. The PA Grant Management Team was renewed for an additional one-year contract to continue managing multi-million-dollar PA grants through the application and post-award grants process. Advisory and compliance grant management support is also currently supporting the ARPA grants for the City. Joseph served as a Senior Project Manager to advise the City on compliance with Federal regulations for both ARPA and FEMA endeavors, regularly meeting with MEMA, City staff, elected officials, and community groups to help support these programs.

JOSEPH SHEETS, FEDERAL FUNDING COMPLIANCE, LEAD SENIOR PROGRAM MANAGER

Madison County, Grants Management, Madison County, FL, United States

Madison County engaged Anser in September 2022 to help the County manage current and future grant opportunities. As a Senior Project Manager, Joseph has lead a multi-disciplinary project team to apply for state and Federal grants for the County. In addition to providing guidance on the County's ARPA funding, Joseph oversaw the team as they applied for three significant grant sources, in Florida's Recreational Trails Program, and the Infrastructure Investment and Jobs Act's (IIJA) Charging and Fueling Infrastructure (CFI) Discretionary grant program, and IIJA's Multi-Purpose Facility Capital Program Fund for a total of over \$9 million in funding managed and pursued. This involved working in tandem with Anser's Clean Mobility, Energy, and Sustainability team to complete the CFI grant application.

Hernando County, Septic Upgrade Incentive Program, Hernando County, FL

Anser's team was hired to be the program administrator's for Hernando County's Septic Upgrade Incentive Program (SUIP), funded through Florida's Department of Environmental Protection. As the Senior Project Manager leading our project team, Joseph oversees the team in their comprehensive management of the program, including:

- Internal and state reporting
- Technical assistance to residents and contractors
- Eligibility review
- Vendor coordination and disbursements
- Site inspections
- Project close-out

Various Clients, American Rescue Plan Consulting Services, United States

In addition to the clients listed above, Anser is currently providing American Rescue Plan services, assisting local governments in all facets of their grant implementation, including needs assessment, eligibility review, allocation plans, 2 CFR 200 compliance, cost verification, program implementation, and pre-audit services for collectively over \$800 million in combined ARPA initiatives. Our clients include:

- | | |
|------------------------|------------------------|
| ■ Dougherty County, GA | ■ Lake Wales, FL |
| ■ Highlands County, FL | ■ Leesburg, FL |
| ■ Jefferson County, FL | ■ Lighthouse Point, FL |
| ■ Madison County, FL | ■ Margate, FL |
| ■ Taylor County, FL | ■ Mascotte, FL |
| ■ Will County, IL | ■ Newberry, FL |
| ■ Brooksville, FL | ■ Ocoee, FL |
| ■ Cherry Hill, NJ | ■ Randolph, MA |
| ■ Dania Beach, FL | ■ Scranton, PA |
| ■ Deerfield Beach, FL | ■ Titusville, FL |
| ■ Fernandina Beach, FL | ■ Vero Beach, FL |
| ■ Gainesville, FL | ■ York, PA |
| ■ Holyoke, MA | |



TARA REYNOLDS

GRANT WRITER

ANSER
ADVISORY
Part of Accenture

EDUCATION

Juris Master, HR Compliance & Risk Management, Florida State University

Bachelor of Science, Environmental Science, Minor in Biology, Florida State University

LICENSES / CERTIFICATIONS

Florida Certified Contract Manager (FCCM)

Notary Public

EXPERIENCE

Years of Experience:

4

Years with Firm:

1

Tara Reynolds brings highly specialized experience helping local governments effectively manage state and federal awarded grants. She has spent three years with the Florida Department of Environmental Protection where she managed projects that were federally funded with the Recreational Trails Program (RTP).

Tara is currently managing projects that require grant administration services and specialized project management. The scope of services Tara manages includes the Community Development Block Grant (CDBG), State Housing Initiatives Program (SHIP), Septic Upgrade and Sewer Connection Incentive Programs, and the American Rescue Plan Act (ARPA) for various local governments. She assists the local governments by providing grants management, grants administration, and grants compliance. Tara processes applications, coordinates with local governments for awards and reimbursement, conducts site inspections, assists with necessary grant reports, and completes environmental reviews for federally funded projects.

REPRESENTATIVE EXPERIENCE

Madison County, American Rescue Plan Act Program Management, Madison County, FL

Madison County received funding provided under ARPA to recover from budgetary, economic, and financial impacts created by the pandemic. Tara assists with the facilitation of funds into broadband infrastructure and recreational grants for residents of the County.

State Housing Initiatives Partnership (SHIP) Program, Florida

The SHIP program provides state funds to local governments as an incentive to create partnerships that produce and preserve affordable homeownership and multifamily housing. Tara serves as the lead SHIP Project Manager for multiple counties, including Jefferson, Taylor, and Wakulla, all who have been clients since as early as 2011. Tara is the lead contact for processing applications, conducting site inspections, assisting with completion of the annual SHIP report, and coordinating with the local governments for awards and reimbursement.

Community Development Block Grant (CDBG) Program, Florida

Tara serves as the lead CDBG Project Manager for multiple local governments, including the City of Center Hill, City of Lake Wales, Madison County, and Wakulla County. Tara is the lead contact for processing applications, conducting site inspections, mandatory bid walkthroughs, contract signing, coordinating with the local governments for awards and reimbursement, and completing environmental reviews.

Septic Upgrade Incentive Program (SUIP) & Sewer Connection Incentive Program (SCIP), Florida

The SUIP program provides funds to local governments to encourage eligible homeowners to voluntarily remediate existing conventional onsite sewage treatment and disposal systems (OSTDS) to include nitrogen reducing enhancements. The SCIP program provides funds to local governments to encourage eligible homeowners to voluntarily connect to central sewer where currently available. Both incentive programs are intended to offset a portion of the homeowner costs. Tara serves as the lead SUIP Project Manager for Hernando and Wakulla County. Tara is the lead contact for processing applications, conducting site inspections, developing programmatic forms and procedures, and coordinating with the local governments for awards and reimbursement.



LAUREN MCAULEY

PROGRAM MANAGER

ANSER
ADVISORY

EDUCATION

Master of Business Admin.,
Risk Management
Florida State University,
Tallahassee, FL

Master of Business Analytics,
Utah State University,
Logan, UT

Bachelor, Actuarial Science,
Minor: Quantitative Finance &
Computer Science,
Utah State University,
Logan, UT

EXPERIENCE

Years of Experience:

7

Years with Firm:

<1

Lauren McAuley is a highly skilled financial management and advisory professional specializing in state and federal compliance. She has exceptional organizational skills, self-motivation, and effective problem-solving experience. Lauren brings nearly a decade of experience in management consulting services, grants management, financial oversight, strategic planning, and disaster recovery.

She has acute knowledge and expertise in serving private and public sector clients establishing project and program policies, procedures, and reporting to ensure adherence to state and federal regulations. She performed risk assessments and optimized monitoring tools for overall program compliance and ensure future project success.

Lauren is a subject matter expert in not only the field of government grant development but also the management of these grant awards, including the programming, obligating annual formula grants, and ensuring agency-wide compliance with funding requirements for each respective funded project.

REPRESENTATIVE EXPERIENCE

Nassau County – State Housing Initiatives Partnership (SHIP) Program Evaluation

Lauren led an evaluation Nassau County's SHIP program by reviewing the county's documentation of processes, procedures, and case files. She performed a compliance audit of the past 3 year of completed application files and provided recommendations on additional document requirements. She presented the final evaluation report to the county managers and board of commissioners.

State of Florida Department of Commerce – Broadband Program

Lauren established application compliance requirements with the Florida Office of Broadband along with scoring criteria. She evaluated capital project applications for the Florida Office of Broadband. She optimized the initial review process to effectively review over 200 applications within an expedited period. She assisted applicants with updating their applications and remediating instances of conflicting capital projects.

City of Orlando - Emergency Rental Assistance Program (ERAP)

Lauren led the City of Orlando through an all-inclusive ERAP program for COVID economic recovery effort. She created policy and procedures for the ERAP program to adhere to the City's and federal program requirements along with establishing the final reporting documents. She performed reviews of over 4,000 applications aligning the documentation to the U.S. Treasury policies. For this project, Lauren developed tools to document applicant eligibility, comprehensive reviews of applicant reimbursement, incorporated business intelligence tool dashboards for reporting project status, and provided technical support.

State of Florida Division of Emergency Management - Grants Management

Lauren led comprehensive grants management for the Florida Division of Emergency Management. Lauren and her team performed 100% validation of costs, reported in project worksheets, and submitted for cost reimbursement under FEMA's Public Assistance grant program. Through Lauren and her team's efforts, FDEM was able to disburse over \$160 million in FEMA reimbursements to local governments. For this project, Lauren developed tools to document project worksheet reviews, incorporated business intelligence tool dashboards for reporting project status, and managed overall project finances. Lauren oversaw compliance and quality of over 1000 projects from initiation to closeout.

LAUREN MCAULEY, PROGRAM MANAGER

State of Florida Department of Transportation – Grants Management

Lauren led an all-inclusive FEMA public assistance project for disaster recovery efforts through Project Worksheet (PW) formulation by performing data validation and grant reconciliation. She optimized the estimated project eligibility amounts by validating debris documentation to ensure completeness prior to submitting documentation to FEMA for reimbursement. Additionally, she prepared reports and commentaries for issues related to anomalies or missing documentation to resolve issues.

Will County - American Rescue Plan Act (ARPA) Financial Reporting

Lauren performed data collection of ARPA performance measures for the quarterly and annual financial reports. She assisted in subrecipient agreement formulation along with subrecipient program guideline formulation. Lauren established subrecipient monitoring and oversight to ensuring subrecipient compliance to federal standards.

State of Florida Department of Financial Services – Cash Management Compliance Audit

Lauren led an all-inclusive compliance audit of the Cash Management system for the Division of Treasury. She validated reconciliations of the cash management and investment management systems. She performed business process mapping and overall business process assessments. She led a team to process agency system incident ticket resolutions to ensure all end-user tickets had been addressed. Lauren and her team published and presented the compliance audit report to the project committee.

City of North Lauderdale – Grant Research, Writing, and Financial Reporting

Lauren performed grant research for funding opportunities to support the city's priorities which included identifying multiple broadband funding sources. She has led the communication efforts with City, County, and State leadership to organize all information necessary for formal grant applications. Additionally, she assists in developing the required financial reports for the City's grants.

State of Florida Department of Health – Medical Marijuana Treatment Center Application Reviews

Lauren led a team of 10 subject matter experts to facilitate application reviews for the business licensing of Medical Marijuana Treatment Centers. She incorporated business intelligence tools to ensure documents' authenticity and completeness. Additionally, she managed project timelines, provided technical support, reported on project status, and managed overall project finances.



JORDAN MRHA

COMPLIANCE AND
REPORTING
PROGRAM MANAGER

ANSER
ADVISORY
Part of **Accenture**

EDUCATION

Master of Science, Finance,
Florida State University,
Tallahassee, FL

Bachelor of Science, Finance,
Florida State University,
Tallahassee, FL

EXPERIENCE

Years of Experience:

5

Years with Firm:

<1

Jordan Mrha is a highly skilled program and project management professional with experience tracking project costs and budgets, providing project management with administration support, and coordinating and assisting with program development and strategic planning. He is very experienced in the supervision and coordination of staff to form efficient and effective teams and can adapt rapidly to new ideas, methods, and environments and apply analysis, logic, and experience when tackling management problems. Jordan has years of hands-on expertise in grants management, program implementation, business process assessments, risk assessments, financial management, and procurement and contract documentation management.

REPRESENTATIVE EXPERIENCE

Florida Division of Emergency Management & Florida Department of Transportation, FEMA Grants Management, Florida

Jordan prepared project worksheets and performed validation of costs submitted for reimbursement under FEMA's public assistance grant program in accordance with applicable rules and regulations for the Florida Division of Emergency Management assisting with Hurricanes F2N, Irma, and Michael. He provided grants management services for public assistance grant programs including recording invoice-related inconsistencies as well as reporting on contract costs that appeared to be ineligible and/or unsupported for reimbursement for the Florida Department of Transportation.

School District of Lee County, FEMA Recovery Compliance, Lee County, FL

As the Grants Project Manager, Jordan is responsible for coordinating with the construction team to ensure reimbursement documentation compliance for over 80 schools that experienced damage requiring permanent repairs or replacement as a result of Hurricane Ian. He contributed to successful application packages seeking reimbursement of projects with over \$80 million in Public Assistance (PA) grant-eligible work. He cultivated professional relationships by providing vital subject matter expertise that benefited the school district maintenance and construction teams given the pace, size, and magnitude of the work required to reopen and repair schools quickly.

Florida Division of Emergency Management, Business Process Assessment, Florida

Jordan performed a comprehensive business process assessment for the Florida Division of Emergency Management, including a current and future state assessment for their system implementation and an analysis of current business processes including grants and contract management from procurement through project closeout. He also created a current state assessment and scoring methodology for the Florida Division of Emergency Management's Florida Recovery Obligation Calculation (F-ROC) pilot program, a program he also assisted in implementing.

Florida Agency for Healthcare Administration, Risk Assessment / Post-Payment Auditing, Florida

Jordan led teams that delivered performance audit services to assist the Florida Agency for Healthcare Administration to meet CMS Promoting Interoperability/EHR Incentive Program requirements. He helped identify gaps in pre-payment verification and post-payment procedures and provided recommendations to close gaps and improve processes. He also performed risk assessments for eligible

JORDAN MRHA, COMPLIANCE AND REPORTING, PROGRAM MANAGER

professionals who received incentive payments for adopting, implementing, or upgrading (AIU), and/or demonstrating meaningful use (MU) of Certified Electronic Health Record Technology.

South Carolina Department of Health and Human Services, Risk Assessment / Post-Payment Auditing, South Carolina

Jordan led teams that delivered performance audit services to meet CMS Promoting Interoperability/EHR Incentive Program requirements. He helped identify gaps in pre-payment verification and post-payment procedures and provided recommendations to close gaps and improve processes. Jordan also performed risk assessments for eligible professionals who received incentive payments for adopting, implementing, or upgrading (AIU), and/or demonstrating meaningful use (MU) of Certified Electronic Health Record Technology.

State of Florida, Medicaid Health Information Technology Plan, Florida

As part of his business process assessment services to the State of Florida, Jordan helped to update the Medicaid Health Information Technology Plan that included a Health Information Exchange (HIE) Study consisting of an "As is" (Current State) and "To be" (Future State) analysis.

Florida Department of Commerce, Pandemic First Responders Program, Florida

Jordan assisted the Florida Department of Commerce (formerly the Florida Department of Economic Opportunity) with program planning and implementation of the Pandemic First Responders Program, which provided disaster relief payments to eligible first responders. Additional responsibilities included leading and training teams that prepared monthly budget reconciliations and invoices for both fixed fee and time and material contracts. Jordan created and/or maintained internal budgets for multiple multimillion-dollar engagements and conducted financial forecasting to project the status of the budget through project completion.



CHEYENNE YOUNG

ASSISTANT PROJECT
MANAGER

ANSER
ADVISORY

EDUCATION

Bachelor, International Affairs,
Minor: Political Science,
Florida State University,
Tallahassee, FL

LICENSES / CERTIFICATES

Florida Certified Contract
Manager

EXPERIENCE

Years of Experience:

7

Years with Firm:

<1

Cheyenne Young is a skilled financial management professional specializing in emergency management and governmental compliance.

She has substantial organizational skills, self-motivation, and effective problem-solving experience while having a positive attitude. Cheyenne brings almost eight years of experience in management consulting services, grants management, financial oversight, strategic planning, and emergency management. She has worked in multiple activations for the Florida Division of Emergency Management, including natural disasters and COVID 19.

She has acute knowledge and expertise in serving public sector clients executing Hazard Mitigation Grant Program contracts, community development, and economic recovery and through grants funding and financial analysis.

REPRESENTATIVE EXPERIENCE

Dougherty County – American Rescue Plan Act (ARPA) Program

Cheyenne worked alongside Joseph Sheets and Alexa Delimon on the American Rescue Plan Act Funding Project. She was in charge of doing the quarterly reports for Quarter 2 and Quarter 3 2023 as well as the audit report for FY 2023.

Hernando County – Septic Upgrade Incentive Program

Cheyenne was responsible for performing all day-to-day duties such as filling out Notice to Proceed documents, Release of Lien documents, INRB Notice documents, as well as processing applications and checking for eligibility verification. She was in charge of communicating with contractors regarding issues, questions for applicants, etc. She assisted Tara Reynolds with payment closeouts for Hernando County. She worked alongside Danielle Hendry with the site inspection photos and keeping track of the site inspection log.

State of Florida Division of Emergency Management – Grant Specialist V

Cheyenne was responsible for developing and executing over 50 million dollars in awarded contracts to the communities of Florida through the Hazard Mitigation Grant Program. She collaborated with Project Managers, Finance Representatives, and Attorneys to ensure accuracy of all documentation and communication with subrecipients throughout the process.

State of Florida Division of Emergency Management – Consultant

Cheyenne was responsible for a fleet of over 60 vehicles and equipment to include the management and reconciliation of the State of Florida WEX credit card account. She kept detailed and accurate logs of all vehicles maintenance and usage utilizing Microsoft Office programs. She worked directly with the Executive Team on various projects and new ideas.

State of Florida Division of Emergency Management – Accountant II

Cheyenne was responsible for accounts payable, financial auditing, and reconciliation while utilizing the FLAIR, My Florida Market Place (MFMP), Axiom Pro, and Salesforce. She organized and managed the file room and assisted with internal and external audit requests.

State of Florida Department of State – Clerk

Cheyenne was responsible for auditing and reconciling the State of Florida Voter registration database for the 2020 election year. She confirmed and updated voter's information per request with a 100% accuracy rating.

LAUREN MCAULEY, PROGRAM MANAGER

Florida State University Department of Financial Aid – Financial Assistant

Cheyenne assisted in the Financial Aid Department in the correspondence review and revision of student accounts. She collaborated with colleagues to ensure the highest quality of care was given to each student or parent.

Tallahassee Community College – Financial Aid Assistant

Cheyenne was responsible for handling thousands of dollars of tuition money daily (cash, check, money order, etc.), reconciling student accounts, while utilizing Microsoft applications as well as the Tallahassee Community College system. She was a direct assistant to the head of the Cashier's Office and filled in for her during her absence.

TAB 5 –DELIVERY AND APPROACH

Delivery and Approach

We understand that Nassau County is seeking to obtain services from a firm with demonstrated experience in Florida's SHIP Program. Our team has extensive knowledge on the eligible uses of SHIP and has assisted many applicants and clients through down payment, closing costs, emergency repairs, and rehabilitation assistance applications. Our approach and delivery responsibilities can be illustrated in the SHIP Program Management Approach graphic below:



Program Management Approach

Our program management approach is derived from the success and experience of our staff working directly for public entities, including local municipalities. Our program management foundations are transparency, collaboration, and diligent attention to detail. We will assure that every dollar is tracked, and that project execution creates the maximum value for the people of the County. Our staff assigned to this contract and who will be working directly with the County and stakeholders, have decades of relevant experience in their individual fields of specialty and will readily apply this experience to expertly execute your project(s).

- Developing annual and other required agency reports with County staff,
- Coordinating with Florida Housing Finance Corporation,
- Assisting with development of Local Housing Assistance Plan (LHAP) strategies,
- Tracking SHIP funds,

- Providing technical support on an ongoing basis to County Staff for compliance with SHIP rules and guidelines,
- Providing technical support and quality review of any applicant intake,
- Coordinating and conducting any required public input including affordable housing committee meetings,
- Regular meetings with County staff to review progress and provide recommendations,
- Developing any needed SHIP contract modifications,
- Reviewing and making recommendations on any SHIP sub-recipient contracts including enforcement of SHIP requirements,
- Assisting staff with the development of any notices or forms for use with the SHIP program, and
- Tracking and advising County staff on the program management.

Application Management

Through the creation of formalized applications and file checklists, our team can streamline the review process. Our team will review for eligibility by ensuring the applicant meets all application requirements which include but are not limited to verifying income and assets, verifying household size, verifying property eligibility, housing affordability testing, and submitting official required documentation. Applications will be accepted on a first come, first served basis, until the County has received an adequate number of eligible applicants that satisfy all of the SHIP set-aside requirements.

Our team understands the importance of guiding applicants through a complex application process. To streamline applicant communication, our team will set up unique lines of communications such as an email address that all administrators can access for applicant documentation submission, questions, and requests for information. Additionally, our application managers will be available with our office phone to assist eligible applicants.

SHIP Contract Award Process

Our team is experienced in working with local municipalities to prepare procurement documentation, conduct pre-construction bid conferences, manage the contractor bid process, draft work write-ups, and coordinate mandatory bid walkthroughs of all eligible homes. Additionally, our staff is capable of executing contracts, facilitating change orders and amendments, and processing payments.

File Management

SHIP projects are a continuous collection of documentation over a long period of time. Therefore, our staff will create and maintain separate case files for all applicants. Each file will adhere to record retention requirements, as well as Florida Housing's standards for file monitoring. Our biggest priority is ensuring that each project file reflects a complete and consistent record of verification and justification for assisting the home with SHIP funds.

Reports

Anser understands that establishing and maintaining a methodology for data collection and documentation compilation, both internal and external to pre-established electronic financial systems,

will be critical to the success of the SHIP program reporting. All documentation submission will be easily understood and maintained by all internal and external team members, including contractors, technical project managers, and other stakeholders. All finalized reports will be sent for the County's review and approval.

The quality control monitoring for SHIP will be one of the keys to overall success of the program. All program monitoring requirements established by the County and Florida Housing Finance Corporation will be utilized alongside Anser's preestablished tools and resources for SHIP programs which will help manage the program process and compliance efficiently through completion.

Communication Plan

As part of our approach, our Team utilizes effective communication management to keep stakeholders informed of the program status. Our Team routinely provides executive-level briefings to:

- Management Team(s),
- Formal Presentations to the elected or appointed, Boards, Councils or Commissions,
- Elected Official, and
- Key stakeholders.

A Communications Plan is developed in coordination with our clients. We routinely provide the following technical assistance at the direction of our clients:





- Call center assistance,
- Intergovernmental communication assistance,
- Outreach programs / town hall meetings,
- Press releases,
- Public information request response,
- Social media posts, and
- Website updates.

TAB 6 – REFERENCES

References





Jefferson County, Florida

SHIP ADMINISTRATION & GRANT MANAGEMENT SERVICES

<p><u>Project Description</u></p> <p>Jefferson County engaged Anser in 2012 to assist in the management of SHIP funds. Anser is responsible for administering and managing the County's SHIP program which includes but is not limited to: manage the client intake process, determine eligibility and make recommendations for SHIP assistance, coordinate with the County to ensure project milestones are met and that the budget is adhered to, provide ongoing technical assistance and respond to citizen complaints and inquiries, develop grant amendments as needed based on changes in the project scope, develop bid documents and manage the housing rehabilitation bidding process, conduct pre-bid conferences, prepare and submit annual reports, manage bid award process and monitor construction progress, manage contractor pay request process, and review and approve contractor change orders, as needed.</p> <p>As the third most rural county in Florida, Jefferson County residents present a great need for affordable housing. Anser's engagement successfully leverages state dollars to propel the County forward by assisting extremely low-, very low-, and low-income households with SHIP funds. Our management approach is catered to Jefferson County to effectively assist residents with homebuyer purchase assistance, home repair, and mobile home replacement.</p>		<p>Jefferson County, FL Shannon Metty County Manager smetty@jeffersoncountyfl.gov 850.997.3083</p>
		<p>2012 – Present</p>
		<p>Funding Agency/Source</p> <ul style="list-style-type: none"> ✓ Florida Housing Finance Corporation ✓ State of Florida Treasury, SHIP
		<p>Scope of Services Provided</p> <ul style="list-style-type: none"> ✓ Program Administration ✓ Applicant Intake and Management ✓ Facilitate Contract Award Process ✓ File Management and Record Retention ✓ Budget Review and Management ✓ Conduct all monitoring, reporting, and auditing requirements for state agencies





Taylor County, Florida

SHIP ADMINISTRATION & GRANT MANAGEMENT SERVICES

<p><u>Project Description</u></p> <p>Taylor County engaged Anser in 2010 to assist in the management of SHIP funds. Anser is responsible for administering and managing the County's SHIP program which includes but is not limited to: manage the client intake process, determine eligibility and make recommendations for SHIP assistance, coordinate with the County to ensure project milestones are met and that the budget is adhered to, provide ongoing technical assistance and respond to citizen complaints and inquiries, develop grant amendments as needed based on changes in the project scope, develop bid documents and manage the housing rehabilitation bidding process, conduct pre-bid conferences, prepare and submit annual reports, manage bid award process and monitor construction progress, manage contractor pay request process, and review and approve contractor change orders, as needed.</p> <p>Located in the Big Bend area and having one of the longest coastlines in the state, Taylor County is rural and susceptible to hurricanes and storm surge. Anser's experience administering SHIP funds has proven to be effective in propelling the County forward by assisting extremely low-, very low-, and low-income households. Our aim is to work closely with the County to identify housing strategies that can best assist residents in their time of need. In addition to homebuyer purchase assistance, home repair, and demolition/reconstruction, we are able to help assist Taylor County residents with disaster recovery and emergency repairs caused by hurricanes to create a more resilient community.</p>		<p>Taylor County, FL Jami Evans Grant Coordinator jevans@taylorcountygov.com 850.838.3553</p>
		<p> 2010 – Present</p>
		<p> Funding Agency/Source</p> <ul style="list-style-type: none"> ✓ Florida Housing Finance Corporation ✓ State of Florida Treasury, SHIP
		<p> Scope of Services Provided</p> <ul style="list-style-type: none"> ✓ Program Administration ✓ Applicant Intake and Management ✓ Facilitate Contract Award Process ✓ File Management and Record Retention ✓ Budget Review and Management ✓ Conduct all monitoring, reporting, and auditing requirements for state agencies

Wakulla County, Florida

SHIP ADMINISTRATION & GRANT MANAGEMENT SERVICES

<p><u>Project Description</u></p> <p>Wakulla County engaged Anser in 2010 to help the County manage current SHIP funding. Anser is responsible for administering and managing the County's SHIP program which includes but is not limited to: manage the client intake process; determine eligibility and make recommendations for SHIP assistance; coordinate with the County to ensure project milestones are met and that the budget is adhered to; provide ongoing technical assistance and respond to citizen complaints and inquiries; develop grant amendments as needed based on changes in the project scope; develop bid documents and manage the housing rehabilitation bidding process; conduct pre-bid conferences; prepare and submit annual reports; manage bid award process and monitor construction progress; manage contractor pay request process; and review and approve contractor change orders, as needed.</p> <p>Also located in the Bid Bend area, Wakulla County is made up of 735.74 square miles of land and water. The County is known for Wakulla Springs, one of the world's largest springs, both in depth and flow. Our engagement with the County allows us to learn about the surrounding resources while driving the community forward by assisting extremely low-, very low-, and low-income households with SHIP funds. Our success involves assisting households that cannot afford home repairs, while protecting natural resources. SHIP funds repair septic systems in despair and/or connect the home to city sewer if available. In addition to home repairs, Wakulla County residents are offered financial assistance with homebuyer purchase and demolition and reconstruction of their homes that are deemed beyond repair.</p>	 <p>Wakulla County, FL Somer Pell Assistant County Administrator of Community Development spell@mywakulla.com 850.926.0919</p>
	 <p>2010 – Present</p>
	 <p>Funding Agency/Source</p> <ul style="list-style-type: none"> ✓ Florida Housing Finance Corporation ✓ State of Florida Treasury, SHIP
	 <p>Scope of Services Provided</p> <ul style="list-style-type: none"> ✓ Program Administration ✓ Applicant Intake and Management ✓ Facilitate Contract Award Process ✓ File Management and Record Retention ✓ Budget Review and Management ✓ Conduct all monitoring, reporting, and auditing requirements for state agencies

TAB 7 – TECHNOLOGY

Technology

Our team can assist the County with procuring a software to help implement digital applications, if the County wishes to upgrade the current manual application process.

TAB 8 – COST

Cost Proposal

While the scope is well defined, the duration and knowledge of your available resources and interface approach are yet to be discovered. We, therefore, advise a not to exceed negotiable fee for our services. The table below expresses our proposed team's all-inclusive fixed hourly rate for each assigned management position and support staff positions to be assigned or potentially to be assigned as part of providing comprehensive services identified. Proposed hourly rates as shown below, are inclusive of all associated costs.

Team Member Role	Hourly Rate
Sr. Vice President	\$250
Sr. Project Manager	\$200
Program Manager	\$185
Grant Manager	\$165
Assistant Project Manager	\$135

Rates stated would be confirmed per individual team member in conjunction with the County prior to contract execution. Our rates include travel and other relevant disbursements for general project advisory services. Special expenditures related to community engagement, events, or third party software licensing are not included and, where applicable and approved in advance by the County, would be charged on a pass-through basis and in accordance with any/all County policies.

EXHIBIT "B"
PRICE SHEET

Firm shall provide STATE HOUSING INITIATIVES PARTNERSHIP (SHIP) PROGRAM ADMINISTRATION SERVICES in accordance with Exhibit A, Scope of Services at the hourly rate below. Hourly rate must be fully burdened to include all costs (overhead, profit, and non-labor expenses, such as travel, mileage, per diem for meals and incidentals, etc.). Total cost shall not exceed the allowable administration budget allowed for the SHIP program.

DESCRIPTION	TOTAL
Sr. Project Manager	\$ 200 /hourly
Project Manager	\$ 185 /hourly
Grant Manager	\$ 165 /hourly
Asst. Project Manager	\$ 135 /hourly
Other: __ Sr. Vice President _____	\$ 250 /hourly
Other: _____	\$ /hourly
Other: _____	\$ /hourly

The undersigned declares that they have examined the Request for Proposal including documents attached, and the Scope of Services and is informed fully with regard to all terms and conditions pertaining thereto and agrees to provide services accordingly at the hourly rate set forth above.

Company: Anser Advisory

Address: 1500 Mahan Drive, Suite 250

City, State, Zip code: Tallahassee, Florida 32308

Phone Number: (850) 681 - 3717 Email: Robert.Sheets@anseradvisory.com

Authorized Signature:  Printed Name: Robert Sheets

Title: Executive Vice President Date: 12/5/2023

TAB 9 – ATTACHMENTS/ADMINISTRATIVE INFORMATION

FORM A

NASSAU COUNTY, FL

**SWORN STATEMENT
UNDER FLORIDA STATUTE 287.133(3)(a) ON PUBLIC ENTITY CRIMES****TO BE RETURNED WITH BID**

THIS MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER
AUTHORIZED TO ADMINISTER OATHS

1. This sworn statement is submitted with Bid, Proposal or Contract for RFP No. NC23-062 State Housing Initiative Partnership (SHIP) Program Administration Services.
2. This sworn statement is submitted by Anser Advisory Consulting, LLC (entity submitting sworn statement), whose business address is 1500 Mahan Drive, Suite 250 Tallahassee, Florida 32308 and its Federal Employee Identification Number (FEIN) is 54-2072311. (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____.)
3. My name is Robert E. Sheets (please print name of individual signing), and my relationship to the entity named above is Executive Vice President.
4. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services, any leases for real property, or any contract for the construction or repair of a public building or public work, to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction or a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in paragraph 287.133(1)(a), Florida Statutes, means:
 - a) A predecessor or successor of a person convicted of a public entity crime; or
 - b) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not to fair market value under an arm's length agreement, shall be prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding thirty-six (36) months shall be considered an affiliate.
7. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into binding contract and which bids or applies to bid on contracts let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)

NASSAU COUNTY, FL

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

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

_____ There has been a proceeding concerning the conviction before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the Hearing Officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)

_____ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

_____ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services.)

R. Sheets

Signature

November 27, 2023

Date

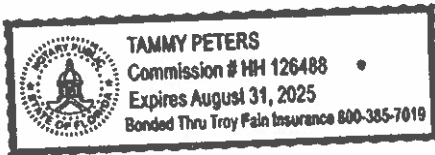
State of: Florida

County of: Leon

Sworn to (or affirmed) and subscribed before me by means of X physical presence or _____ online notarization, this 27 day of November, 2023 by Robert E. Sheets who is X personally known to me or _____ produced _____ as identification.

Tammy Peters
Notary Public

My commission expires: August 31, 2025



[illegible]

7. REFERENCES:

List at least three references for which you have provided services related to this RFP Scope of Services (similar scope/size) in the past five years - preferably government agencies.

Reference #1:

Company/Agency Name: Wakulla County Board of County Commissioners
Address: 3093 Crawfordville Highway, Crawfordville, FL 32327
Contract Person: Somer Pell, Assistant County Administrator of Community Development
Phone: (850) 926-0919 Email: spell@mywakulla.com
Project Description: Administer and manage SHIP program on behalf of Wakulla County.
Contract \$ Amount: \$350,000
Date Completed: 2013 to Present

Reference #2:

Company/Agency Name: Taylor County Board of County Commissioners
Address: 401 Industrial Park Drive, Perry, FL 32347
Contract Person: Jami Evans, Grant Coordinator
Phone: (850) 838-3553 Email: jevans@taylorcountygov.com
Project Description: Administer and manage SHIP program on behalf of Taylor County.
Contract \$ Amount: \$350,000
Date Completed: 2010 to Present

Reference #3:

Company/Agency Name: Jefferson County Board of County Commissioners
Address: 1484 S. Jefferson Street, Monticello, FL 32344
Contract Person: Shannon Metty, County Manager
Phone: (850) 997-3083 Email: smetty@jeffersoncountyfl.gov
Project Description: Administer and manage SHIP program on behalf of Jefferson County.
Contract \$ Amount: \$350,000
Date Completed: 2012 to Present

8. NOTICE OF PARTIES AND BINDING AUTHORITY

The following information is required if Respondent is selected for award of a contract with the County.

Notice to Parties

All notices, demands, requests for approvals or other communications shall be in writing, and shall be sent by registered or certified mail, postage prepaid, return receipt requested, or overnight delivery service (such as federal express), or courier service or by hand delivery to:

Contractor Name: Anser Advisory
Attn: Robert Sheets
Mailing Address: 1500 Mahan Drive, Suite 250
Tallahassee, Florida 32308

Binding Authority

The person to execute the contract must be an officer of the company. If not an officer of the company, Respondent must provide proof of signing authority. Please provide the name, email address, and phone number of person who will execute the contract, if awarded.

Name of Person to execute contract (if awarded): Robert Sheets
Title: Executive Vice President
Email Address: Robert.Sheets@anseradvisory.com
Phone Number: (850) 681 - 3717

The Remainder of this Page Intentionally Left Blank

FORM C

NASSAU COUNTY, FL

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that _____
Anser Advisory Consulting LLC (print or type name of firm)

1. Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance in the workplace named above and specifying actions that will be taken against violations of such prohibition.
2. Informs employees about the dangers of drug abuse in the workplace, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
3. Gives each employee engaged in providing commodities or contractual services that are under bid or proposal, a copy of the statement specified above.
4. Notifies the employees that as a condition of working on the commodities or contractual services that are under bid or proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, plea of guilty or nolo contendere to, any violation of Chapter 1893, or any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written statement to acknowledge their receipt.
5. Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
6. Makes a good faith effort to continue to maintain a drug free workplace through the implementation of a drug free workplace program.

[Remainder of the page intentionally blank.]

NASSAU COUNTY, FL

"As a person authorized to sign a statement, I certify that the above-named business, firm, or corporation complies fully with the requirements set forth herein."

R. Sheets

Authorized Signature

November 27, 2023

Date Signed

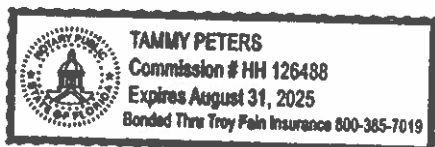
State of: Florida

County of: Leon

Sworn to (or affirmed) and subscribed before me by means of X physical presence or online notarization, this 27th day of November, 2023 by Robert E. Sheets who is X personally known to me or produced as identification.

Tammy Peters
Notary Public

My commission expires: August 31, 2025



FORM D
E-VERIFY AFFIDAVIT

**NASSAU COUNTY E-VERIFY FORM UNDER
SECTION 448.095, FLORIDA STATUTES**

Project Name: Nassau County State Housing Initiatives Partnership(Ship) Program Administration Services

Bid No./Contract No.: RFP No. NC23-062

DEFINITIONS:

"Contractor" means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration. "Contractor" includes, but is not limited to, a vendor or consultant.

"Subcontractor" means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

"E-Verify System" means an internet-based system operated by the United States Department of Homeland Security that allows participating employers to electronically verify the employment eligibility of newly hired employees.

Effective January 1, 2021, Contractors, shall register with and use the E-Verify System in order to verify the work authorization status of all newly hired employees. Contractor shall register for and utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a. All persons employed by a Contractor to perform employment duties within Florida during the term of the contract; and
- b. All persons (including subvendors/subconsultants/subcontractors) assigned by Contractor to perform work pursuant to the contract with Nassau County. The Contractor acknowledges and agrees that registration and 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 with Nassau County; and
- c. Should vendor become the successful Contractor awarded for the above-named project, by entering into the contract, the Contractor shall comply with the provisions of Section 448.095, Florida Statutes, "Employment Eligibility", as amended from time to time. This includes, but is not limited to, registration and utilization of the E-Verify System to verify the work authorization status of all newly hired employees. The Contractor shall also execute the attached affidavit (Attachment "A") attesting that the Contractor does not employ, contract with, or such affidavit for the duration of the contract; and
- d. Contractor shall also require all subcontractors to execute the attached affidavit (Attachment "B") attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The Contractor shall maintain a copy of such affidavit for the duration of the contract.

CONTRACT TERMINATION:

- a. If Nassau County has a good faith belief that a Contractor has knowingly violated §448.09(1) or §448.095(2), Florida Statutes, the contract shall be terminated.
- b. If Nassau County has a good faith belief that a subcontractor has knowingly violated §448.09(1) or §448.095(2), Florida Statutes, but the Contractor otherwise complied with Chapter 448, Florida Statutes, Nassau County shall promptly notify the Contractor and order the Contractor to immediately terminate the contract with the subcontractor.
- c. A contract terminated under subparagraph a) or b) is not a breach of contract and may not be considered as such.
- d. Any challenge to termination under this provision must be filed in the Circuit Court no later than twenty (20) calendar days after the date of termination.
- e. If the contract is terminated for a violation of the Statute by the Contractor, the Contractor may not be awarded a public contract for a period of one (1) year after the date of termination.

FORM E - 1
CONTRACTOR E-VERIFY AFFIDAVIT

I hereby certify that Anser Advisory Consulting, LLC (Contractor Company Name) does not employ, contract with, or subcontract with an unauthorized alien, and is otherwise in full compliance with Section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021 have had their work authorization status verified through the E-Verify system.

A true and correct copy of Anser Adviosry Consulting, LLC (Contractor Company Name) proof of registration in the E-Verify system is attached to this Affidavit.

Robert E. Sheets
Print Name: Robert E. Sheets
Date: November 27, 2023

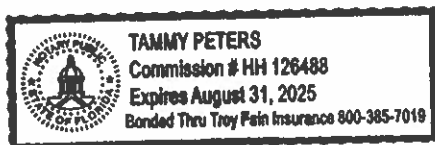
STATE OF FLORIDA
COUNTY OF Leon

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization, this November 27, 2023 (Date) by Robert Sheets (Name of Officer or Agent, Title of Officer or Agent) of

(Name of Contractor Company Acknowledging), a _____ (State or Place of Incorporation) Corporation, on behalf of the Corporation. He/She is ☒ personally known to me or ☐ has produced _____ as identification.

Tammy Peters
Notary Public
Tammy Peters
Printed Name

My Commission Expires: August 31, 2025



FORM E - 2
SUBCONTRACTOR E-VERIFY AFFIDAVIT

I hereby certify that _____ (Subcontractor Company Name) does not employ, contract with, or subcontract with an unauthorized alien, and is otherwise in full compliance with Section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021 have had their work authorization status verified through the E-Verify system.

A true and correct copy of _____ (Subcontractor Company Name) proof of registration in the E-Verify system is attached to this Affidavit.

Print Name: _____

Date: _____

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization, this _____ (Date) by _____
(Name of Officer or Agent, Title of Officer or Agent) of _____
(Name of Contractor Company Acknowledging), a _____ (State or Place of Incorporation) Corporation, on behalf of the Corporation. He/She is ☐ personally known to me or ☐ has produced _____ as identification.

Notary Public

Printed Name

My Commission Expires: _____