

**RESOLUTION NO. 18-09-85**

**A RESOLUTION OF THE VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA APPROVING AN AGREEMENT WITH INSTITUTE FOR BUILDING TECHNOLOGY & SAFETY, INC. FOR GRANT WRITING CONSULTING AND SUPPORT SERVICES; AUTHORIZING THE VILLAGE MANAGER TO EXECUTE THE AGREEMENT; AUTHORIZING VILLAGE OFFICIALS TO IMPLEMENT THE TERMS AND CONDITIONS OF THE AGREEMENTS; AUTHORIZING THE VILLAGE MANAGER TO EXPEND BUDGETED FUNDS; AND PROVIDING FOR AN EFFECTIVE DATE**

**WHEREAS**, Islamorada, Village of Islands (the “Village”) prepared and advertised a Request for Proposals (“RFP”) for Grant Writing Consulting and Support Services, (RFP-18-17); and

**WHEREAS**, the Village received proposals in response to RFP 18-17 and a Village evaluation committee consisting of Village staff (the “Committee”) conducted a review process and provided rankings of the responses to the Village Manager and the Village Council for approval; and

**WHEREAS**, the Committee recommended the highest ranked proposer In Rem, Inc. (“In Rem”) for selection; and

**WHEREAS**, on July 19, 2018, the Village Council adopted Resolution 18-07-56, thereby approving the selection of In Rem for the services set forth in RFP 18-12 and authorizing the Village Attorney and Village Manager to negotiate an agreement for the services; and

**WHEREAS**, during negotiations with In Rem, the Village Manager became aware that In Rem would not provide grant administration service and negotiations ceased; and

**WHEREAS**, the Village Attorney began negotiating with the second highest ranked proposer, Institute for Building Technology & Safety (“IBTS”).

**WHEREAS**, by executing the agreement with IBTS, the Village will receive assistance

in completing the complex grant applications and compliance requirements; and

**WHEREAS**, the Village Council has determined that approval of the Agreements is in the best interest of the Village and its residents.

**NOW, THEREFORE, BE IT RESOLVED BY THE VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA, AS FOLLOWS:**

**Section 1. Recitals.** The above recitals are true and correct and incorporated into this Resolution by this reference.

**Section 2. Approval of Agreements.** The Village Council of Islamorada, Village of Islands, hereby approves the Agreement with IBTS for Grant Writing Consulting and Support Services pursuant to RFP 18-17, copy of which is attached as Exhibit “A”, together with such non-material changes as may be acceptable to the Village Manager and approved as to form and legality by the Village Attorney:

**Section 3. Authorization of Village Officials.** The Village Manager and/or his designee and the Village Attorney are authorized to take all actions necessary to implement the terms and conditions of the Agreements.

**Section 4. Authorization of Fund Expenditure.** Notwithstanding the limitations imposed upon the Village Manager pursuant to the Village’s Purchasing Procedures Ordinance, the Village Manager is authorized to expend budgeted funds to implement the terms and conditions of the Agreements.

**Section 5. Execution of Agreement.** The Village Manager is authorized to execute the Agreement on behalf of the Village, to execute any required agreements and/or documents to implement the terms and conditions of the Agreement and to execute any extensions and/or amendments to the Agreement, subject to the approval as to form and legality by the Village Attorney.

**Section 6.**      **Effective Date.**    This Resolution shall take effect immediately upon adoption.

Motion to adopt by Vice Mayor Deb Gillis, second by Councilman Mike Forster.

**FINAL VOTE AT ADOPTION**

**VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS**

|                           |     |
|---------------------------|-----|
| Mayor Chris Sante         | YES |
| Vice Mayor Deb Gillis     | YES |
| Councilman Mike Forster   | YES |
| Councilwoman Cheryl Meads | YES |
| Councilman Jim Mooney     | YES |

**PASSED AND ADOPTED ON THIS 6<sup>TH</sup> DAY OF SEPTEMBER, 2018.**

  
\_\_\_\_\_  
CHRIS SANTE, MAYOR

ATTEST:

  
\_\_\_\_\_  
KELLY TOTH, VILLAGE CLERK

APPROVED AS TO FORM AND LEGALITY  
FOR THE USE AND BENEFIT OF ISLAMORADA,  
VILLAGE OF ISLANDS ONLY

  
\_\_\_\_\_  
ROGET V. BRYAN, VILLAGE ATTORNEY

## **AGREEMENT**

THIS IS AN AGREEMENT, dated the 22 day of August, 2018, between:

ISLAMORADA, VILLAGE OF ISLANDS  
a Florida municipal corporation, hereinafter "VILLAGE,"

and

INSTITUTE FOR BUILDING TECHNOLOGY AND SERVICES  
a Not-for-Profit corporation, authorized to do business in the  
State of Florida, hereinafter "CONTRACTOR."

### **WITNESSETH:**

In consideration of the mutual terms and condition, promises, covenants, and payments hereinafter set forth, VILLAGE and CONTRACTOR agree as follows:

### **ARTICLE 1** **PREAMBLE**

In order to establish the background, context and form of reference for this Agreement and to generally express the objectives, and intentions, of the respective parties herein, the following statements, representations and explanations shall be accepted as predicates for the undertakings and commitments included within the provisions which follow and may be relied upon by the parties as essential elements of the mutual considerations upon which this Agreement is based.

1.1 The VILLAGE is in need of an independent contractor to assist in completing grant applications and issued RFQ 18-17 for Grant Writing Consulting and Support Services seeking proposals from qualified vendors.

1.2 On June 15, 2018, the VILLAGE received a proposal from CONTRACTOR in response to RFQ 18-17, for Grant Writing Consulting and Support Services (the "Services").

1.3 On July 19, 2018, the Village Council of Islamorada, Village of Islands adopted Resolution No. 18-07-56, thereby accepting the proposal from CONTRACTOR and authorizing the Village to negotiate an Agreement with CONTRACTOR for the proposed Services.

1.4 VILLAGE and CONTRACTOR desire to enter into an Agreement for the provision of the Services as set forth herein.

1.5 The Village Manager is authorized to execute an agreement with CONTRACTOR for services related to the scope of work set forth in the Proposal attached hereto as Exhibit "A" and as more particularly described herein.

**ARTICLE 2**  
**SCOPE OF WORK**

2.1 The CONTRACTOR shall furnish all of the materials, tools, supplies, and labor necessary to perform all of the work described in the Proposal, a copy of which is attached hereto and specifically made a part of this Agreement as Exhibit "A".

2.2 CONTRACTOR hereby represents to VILLAGE, with full knowledge that VILLAGE is relying upon these representations when entering into this Agreement with CONTRACTOR, that CONTRACTOR has the professional expertise, experience and manpower to perform the services to be provided by CONTRACTOR pursuant to the terms of this Agreement.

2.3 CONTRACTOR assumes professional and technical responsibility for performance of its services to be provided hereunder in accordance with applicable recognized professional standards. If within twelve (12) months following completion of its services, such services fail to meet the aforesaid standards, and the VILLAGE promptly advises CONTRACTOR thereof in writing, CONTRACTOR agrees to re-perform such deficient services without charge to the VILLAGE.

2.4 None of the work or services under this contract shall be subcontracted beyond that shown on List of Major Sub-contractors submitted to the VILLAGE by CONTRACTOR, unless CONTRACTOR obtains prior written consent from the VILLAGE. Approved subcontractors shall be subject to each provision of this contract and CONTRACTOR shall be responsible and indemnify the VILLAGE for all subcontractors' acts, errors or omissions.

**ARTICLE 3**  
**TIME FOR COMPLETION**

3.1 The CONTRACTOR shall commence work as directed by VILLAGE and in accordance with a project implementation timeline to be provided to CONTRACTOR by the VILLAGE. CONTRACTOR shall complete all work in a timely manner in accordance with the project timeline and as stated in Exhibit "A" to this Agreement.

3.2 This Agreement shall commence on the date this Agreement is fully executed by all parties.

3.3 Anything to the contrary notwithstanding, minor adjustment to the timetable for completion approved by VILLAGE in advance, in writing, will not constitute a delay by CONTRACTOR. Furthermore, a delay due to an Act of God, fire, lockout, strike or labor dispute, riot or civil commotion, act of public enemy or other cause beyond the control of CONTRACTOR shall extend this Agreement for a period equal to such delay and during this period such delay shall not constitute a delay by CONTRACTOR for which liquidated damages are due.

**ARTICLE 4**  
**CONTRACT SUM**

4.1 The VILLAGE hereby agrees to pay CONTRACTOR for the faithful performance of this Agreement, for work completed in accordance with the Proposal attached hereto as Exhibit "A",

and as directed by VILLAGE. Prices for work completed by the CONTRACTOR shall be as reflected in CONTRACTOR's Proposal attached hereto and made a part hereof as Exhibit "A". A total contract price hereto is referred to as Contract Sum and shall not exceed **Twenty-Five Thousand Dollars (\$25,000.00)**.

4.2 The VILLAGE will make payments to CONTRACTOR for completed and proper work and in the amounts stated in Exhibit "A".

4.3 The CONTRACTOR shall guarantee all portions of the Project against poor workmanship and faulty materials for a period of twelve (12) months after final payment and shall immediately correct any defects which may appear during this period upon notification by VILLAGE.

4.4 The making and acceptance of the final payment shall constitute a waiver of all claims by the CONTRACTOR other than those arising from requirements of the specifications.

4.5 CONTRACTOR is prohibited from placing a lien on the Village's property. This prohibition applies to; *inter alia*, all sub-CONTRACTORS and subcontractors, suppliers and labors.

#### ARTICLE 5 CONTRACTOR'S LIABILITY INSURANCE

5.1 The CONTRACTOR shall not commence work under this contract until he has obtained all insurance required under this paragraph and such insurance has been approved by the VILLAGE nor shall the CONTRACTOR allow any Subcontractor to commence work on his sub-contract until all similar such insurance required of the subcontractor has been obtained and approved.

5.2 Certificates of insurance, reflecting evidence of the required insurance, shall be filed with the Village prior to the commencement of the work. These Certificates shall contain a provision that coverage afforded under these policies will not be canceled until at least thirty (30) days prior written notice has been given to the VILLAGE. Policies shall be issued by companies authorized to do business under the laws of the State of Florida.

5.3 Financial Ratings must be no less than "A" in the latest edition of "Bests Key Rating Guide", published by A.M. Best Guide.

5.4 Insurance shall be in force until all work required to be performed under the terms of the Contract is satisfactorily completed as evidenced by the formal acceptance by the VILLAGE. In the event the insurance certificate provided indicates that the insurance shall terminate and lapse during the period of this contract, then in that event, the CONTRACTOR shall furnish, at least thirty (30) days prior to the expiration of the date of such insurance, a renewed certificate of insurance as proof that equal and like coverage for the balance of the period of the contract and extension thereunder is in effect. The CONTRACTOR shall not continue to work pursuant to this contract unless all required insurance remains in full force and effect.

5.5 Comprehensive General Liability insurance to cover liability bodily injury and property damage. Exposures to be covered are: premises, operations, products/completed operations, and certain contracts. Coverage must be written on an occurrence basis, with the following limits of liability:

- a) Workers' Compensation Insurance - as required by law;
- b) Comprehensive General Liability Insurance - \$1,000,000 per occurrence;
- c) Automobile Liability Insurance - \$1,000,000 per occurrence, \$1,000,000 per Accident for bodily injury and \$1,000,000 per accident for property damage.

5.6 The CONTRACTOR shall hold the VILLAGE, its agents, and employees, harmless on account of claims for damages to persons, property or premises arising out of CONTRACTOR's negligent operations in completing this Agreement and name the VILLAGE as an additional insured under their policy.

5.7 The VILLAGE reserves the right to require any other insurance coverage it deems necessary depending upon the exposures.

#### ARTICLE 6 PROTECTION OF PROPERTY

6.1 At all times during the performance of this Contract, the CONTRACTOR shall protect the VILLAGE's property and properties adjoining the Project site from all damage whatsoever on account of the work being carried on pursuant to this Agreement.

#### ARTICLE 7 CONTRACTOR'S INDEMNIFICATION

7.1 The CONTRACTOR agrees to release the VILLAGE from and against any and all liability and responsibility in connection with the above mentioned matters. The CONTRACTOR further agrees not to sue or seek any money or damages from VILLAGE in connection with the above mentioned matters, except in the event that the VILLAGE fails to pay to CONTRACTOR the fees and costs as provided for in Article 4 herein.

7.2 The CONTRACTOR agrees to indemnify and hold harmless the VILLAGE, its trustees, elected and appointed officers, agents, servants and employees, from and against any and all claims, demands, or causes of action of whatsoever kind or nature, and the resulting losses, VILLAGE. In the event the insurance certificate provided indicates that the insurance shall terminate and lapse during the period of this contract, then in that event, the CONTRACTOR shall furnish, at least thirty (30) days prior to the expiration of the date of such insurance, a renewed certificate of insurance as proof that equal and like coverage for the balance of the period of the contract and extension thereunder is in effect. The CONTRACTOR shall not continue to work pursuant to this contract unless all required insurance remains in full force and effect.

7.3 If a court of competent jurisdiction holds the Village liable for certain tortuous acts of its agents, officers, or employees, such liability shall be limited to the extent and limit

provided in 768.28, Florida Statutes. This provision shall not be construed as a waiver of any right or defense that the Village may possess. The Village specifically reserves all rights as against any and all claims that may be brought.

## **ARTICLE 8**

### **INDEPENDENT CONTRACTOR**

8.1 This Agreement does not create an employee/employer relationship between the parties. It is the intent of the parties that the CONTRACTOR is an independent contractor under this Agreement and not the VILLAGE's employee for all purposes, including but not limited to, the application of the Fair Labor Standards Act minimum wage and overtime payments, Federal Insurance Contribution Act, the Social Security Act, the Federal Unemployment Tax Act, the provisions of the Internal Revenue Code, the State Workers Compensation Act, and the State unemployment insurance law. The CONTRACTOR shall retain sole and absolute discretion in the judgment of the manner and means of carrying out the CONTRACTOR's activities and responsibilities hereunder provided. This Agreement shall not be construed as creating any joint employment relationship between the CONTRACTOR and the VILLAGE and the VILLAGE will not be liable for any obligation incurred by CONTRACTOR, including but not limited to unpaid minimum wages and/or overtime premiums.

## **ARTICLE 9**

### **PERFORMANCE BOND**

9.1 No performance bond shall be required under this Agreement.

## **ARTICLE 10**

### **CHANGES TO SCOPE OF WORK AND ADDITIONAL WORK**

10.1 The VILLAGE or CONTRACTOR may request changes that would increase, decrease or otherwise modify the Scope of Services/Basic Services to be provided under this Agreement as described in Article 2 of this Agreement. Such changes or additional services must be in accordance with the provisions of the Code of Ordinances of the VILLAGE and must be contained in a written amendment, executed by the parties hereto, with the same formality and with equality and dignity prior to any deviation from the terms of this Agreement, including the initiation of any additional or extra work. Each amendment shall at a minimum include the following information on each project:

PROJECT NAME  
PROJECT DESCRIPTION  
ESTIMATED PROJECT COST  
ESTIMATED COST FOR ADDITION OR CHANGE TO PROJECT CONTRACT  
ESTIMATED PROJECT COMPLETION DATE

10.2 In no event will the CONTRACTOR be compensated for any work which has not been described in a separate written agreement executed by the parties hereto.

## **ARTICLE 11**

### **TERM AND TERMINATION**



11.1 This Agreement may be terminated by either party for cause, or the VILLAGE for convenience, upon ten (10) days written notice by the VILLAGE to CONTRACTOR in which event the CONTRACTOR shall be paid its compensation for services performed to termination date. In the event that the CONTRACTOR abandons this Agreement or causes it to be terminated, he shall indemnify the VILLAGE against any loss pertaining to this termination up to a maximum of the full contracted fee amount. All finished or unfinished documents, data, studies, plans, surveys, and reports prepared by CONTRACTOR shall become the property of VILLAGE and shall be delivered by CONTRACTOR to VILLAGE.

11.2 This Agreement shall take effect as of the date of execution as shown herein below and continue for such time as is contemplated by the VILLAGE.

## ARTICLE 12 CONTRACT DOCUMENTS

12.1 CONTRACTOR and VILLAGE hereby agree that the following Specification and Contract Documents, which are attached hereto and made a part thereof, are fully incorporated herein and made a part of this Agreement, as if written herein word for word: this Agreement; CONTRACTOR's Proposal in response to RFQ 18-17 for Grant Writing Consulting and Support Services as set forth in and made a part of this Agreement as Exhibit "A"; and all other exhibits thereto.

## ARTICLE 13 MISCELLANEOUS

13.1 Legal Representation. It is acknowledged that each party to this Agreement had the opportunity to be represented by counsel in the preparation of this Agreement and, accordingly, the rule that a contract shall be interpreted strictly against the party preparing same shall not apply due to the joint contribution of both parties.

13.2 Assignments. This Agreement, or any interest herein, shall not be assigned, transferred or otherwise encumbered, under any circumstances, by CONTRACTOR without the prior written consent of VILLAGE. For purposes of this Agreement, any change of ownership of CONTRACTOR shall constitute an assignment which requires VILLAGE approval. However, this Agreement shall run to the VILLAGE and its successors and assigns.

13.3 Records. CONTRACTOR shall keep books and records and require any and all subcontractors to keep books and records as may be necessary in order to record complete and correct entries as to personnel hours charged to this engagement, and any expenses for which CONTRACTOR expects to be reimbursed, if applicable. Such books and records will be available at all reasonable times for examination and audit by VILLAGE and shall be kept for a period of three (3) years after the completion of all work to be performed pursuant to this Agreement. Incomplete or incorrect entries in such books and records will be grounds for disallowance by VILLAGE of any fees or expenses based upon such entries.

VILLAGE is a public agency subject to Chapter 119, Florida Statutes. To the extent that CONTRACTOR is acting on behalf of VILLAGE pursuant to Section 119.0701, Florida Statutes, CONTRACTOR shall:

- a. Keep and maintain public records that ordinarily and necessarily would be required to be kept and maintained by VILLAGE were VILLAGE performing the services under this agreement;
- b. Provide the public with access to such public records on the same terms and conditions that the County would provide the records and at a cost that does not exceed that provided in Chapter 119, Florida Statutes, or as otherwise provided by law;
- c. Ensure that public records that are exempt or that are confidential and exempt from public record requirements are not disclosed except as authorized by law; and
- d. Meet all requirements for retaining public records and transfer to VILLAGE, at no cost, all public records in possession of the CONTRACTOR upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt. All records stored electronically must be provided to the VILLAGE.

13.4 Ownership of Documents. Reports, surveys, plans, studies and other data provided in connection with this Agreement are and shall remain the property of Village.

13.5 No Contingent Fees. CONTRACTOR warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the CONTRACTOR, to solicit or secure this Agreement, and that it has not paid or agreed to pay any person, company, corporation, individual or firm, other than a bona fide employee working solely for CONTRACTOR, any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For the breach or violation of this provision, the VILLAGE shall have the right to terminate the Agreement without liability at its discretion, to deduct from the contract price, or otherwise recover the full amount of such fee, commission, percentage, gift or consideration.

13.6 Notice. Whenever any party desires to give notice unto any other party, it must be given by written notice, sent by registered United States mail, with return receipt requested, addressed to the party for whom it is intended and the remaining party, at the places last specified, and the places for giving of notice shall remain such until they shall have been changed by written notice in compliance with the provisions of this section. For the present, the CONTRACTOR and the VILLAGE designate the following as the respective places for giving of notice:

VILLAGE: Seth Lawless, Village Manager  
Village Administration Center  
Islamorada, Village of Islands

86800 Overseas Highway  
Islamorada, Florida 33036

Copy To: Roget V. Bryan, Village Attorney  
Islamorada, Village of Islands  
86800 Overseas Highway  
Islamorada, Florida 33036

CONTRACTOR: Attn: Steve Parisi  
Institute for Building Technology and Safety  
3027 Marina Bay Drive, Suite 110  
League City, Texas 77573

13.7 Binding Authority. Each person signing this Agreement on behalf of either party individually warrants that he or she has full legal power to execute this Agreement on behalf of the party for whom he or she is signing, and to bind and obligate such party with respect to all provisions contained in this Agreement.

13.8 Exhibits. Each Exhibit referred to in this Agreement forms an essential part of this Agreement. The exhibits if not physically attached should be treated as part of this Agreement and are incorporated herein by reference.

13.9 Headings. Headings herein are for convenience of reference only and shall not be considered on any interpretation of this Agreement.

13.10 Severability. If any provision of this Agreement or application thereof to any person or situation shall, to any extent, be held invalid or unenforceable, the remainder of this Agreement, and the application of such provisions to persons or situations other than those as to which it shall have been held invalid or unenforceable shall not be affected thereby, and shall continue in full force and effect, and be enforced to the fullest extent permitted by law.

13.11 Governing Law. This Agreement shall be governed by the laws of the State of Florida with venue lying in Monroe County, Florida.

13.12 Disputes. Any claim, objection, or dispute arising out of the terms of this Agreement shall be litigated in the Sixteenth Judicial Circuit Court in and for Monroe County.

13.13 Attorney's Fees. To the extent authorized by law, in the event that either party brings suit for enforcement of this Agreement, the prevailing party shall be entitled to attorney's fees and court costs in addition to any other remedy afforded by law.

13.14 Extent of Agreement. This Agreement together with Contract Documents, attached as an Exhibit hereto, as amended herein above represents the entire and integrated agreement between the VILLAGE and the CONTRACTOR and supersedes all prior negotiations, representations or agreements, either written or oral.

13.15 Waiver. Failure of the VILLAGE to insist upon strict performance of any provision or

condition of this Agreement, or to execute any right therein contained, shall not be construed as a waiver or relinquishment for the future of any such provision, condition, or right, but the same shall remain in full force and effect.

**(This space intentionally left blank)**

IN WITNESS WHEREOF, the parties have executed this Agreement on the respective dates under each signature: The VILLAGE, signing by and through its Village Manager, attested to by its Village Clerk, duly authorized to execute same, and by CONTRACTOR, by and through its \_\_\_\_\_, duly authorized officer to execute same.

**VILLAGE**

ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA

By: \_\_\_\_\_

Seth Lawless, Village Manager

AUTHENTICATION:

  
\_\_\_\_\_  
Kelly Toth, Village Clerk

(SEAL)

APPROVED AS TO FORM AND LEGALITY  
FOR THE USE AND BENEFIT OF ISLAMORADA,  
VILLAGE OF ISLANDS, FLORIDA, ONLY

  
\_\_\_\_\_  
Roget V. Bryan, Village Attorney

CONTRACTOR

WITNESSES:

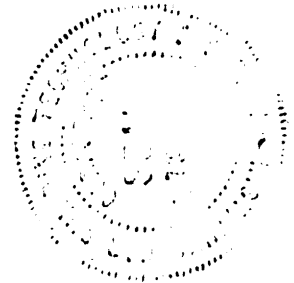
[Signature]

By: [Signature]  
Shyam Choudhary President  
Institute for Building Technology  
and Safety

Tracy Boegner

ATTEST:

[Signature]  
Assistant SECRETARY



STATE OF Virginia )  
COUNTY OF Loudoun )

Virginia BEFORE ME, an officer duly authorized by law to administer oaths and take acknowledgments, personally appeared Shyam Choudhary Pres. of IBTS a Florida corporation, and acknowledged executed the foregoing Agreement as the proper official of IBTS, for the use and purposes mentioned in it and affixed the official seal of the corporation, and that the instrument is the act and deed of that corporation.

IN WITNESS OF THE FOREGOING, I have set my hand and official seal at in the State and County aforesaid on this 22<sup>nd</sup> day of Aug. 2018.

Tracy Boegner  
NOTARY PUBLIC

My Commission Expires:



**See attached document for Exhibit "A"**

**Institute for Building Technology and Safety**

*(Proposal for Grant Writing Consulting and Support Services)*





Institute for Building Technology and Safety

3027 Marina Bay Drive, Suite 110  
League City, TX 77573  
713-955-7287  
[www.ibts.org](http://www.ibts.org)

# GRANT WRITING CONSULTING AND SUPPORT SERVICES

ISLAMORADA, VILLAGE OF ISLANDS  
VILLAGE ADMINISTRATIVE CENTER, 3RD FLOOR  
86800 OVERSEAS HIGHWAY  
ISLAMORADA, FL 33036  
RFQ 18-17  
JUNE 15, 2018 AT 3:00 P.M.

Steve Parisi  
[sparisi@ibts.org](mailto:sparisi@ibts.org)  
614-257-8356



June 15, 2018

# Grant Writing Consulting and Support Services

|                |   |
|----------------|---|
| RFQ Number:    | RFQ 18-17   |
| Subject:       | Grant Writing Consulting and Support Services             |
| Firm Name:     | Institute for Building Technology and Services            |
| Contact:       | Steve Parisi  |
| Address:       | 3027 Marina Bay Drive, Suite 110<br>League City, TX 77573 |
| Telephone:     | 614.257.8356  |
| Proposal Date: | June 15, 2018   |





Ana Hernandez  
Procurement and Grants Administrator  
Islamorada, Village of Islands  
Village Administrative Center, 3rd Floor  
86800 Overseas Highway  
Islamorada, FL 33036

RE: Grant Writing Consulting and Support Services  
RFQ 18-17

Dear Ms. Hernandez:

Islamorada, like all the jurisdictions in the Keys, has suffered from multiple weather events that have affected the infrastructure and economy of the community. Florida is primed to receive more than \$1.3 billion in Community Development Block Grant Disaster Recovery (CDBG-DR), HUD mitigation dollars. For example, one near-term grant of interest may be for affordable housing units recently announced by the Department of Economic Opportunity. The Village may be eligible for up to 300 affordable housing units. To improve recovery opportunities, it is essential that the Village be able to apply successfully to available grant monies from multiple entities: federal, state, and even corporate.

To ensure it optimizes its opportunities to capture grant funds, the Village requires a partner that understands the intricacies of this complex funding environment: the rules, the regulations, how to determine eligibility, and how to write an optimized grant request that will help achieve local goals. The Institute for Building Technology and Safety (IBTS) is well aware of the issues associated with getting grant funding. We have staff who have been responsible for recovery from major disasters – Hurricanes Katrina, Ike, Harvey, and more. They are intimately familiar with the intricacies of applying for and using multiple grant funds to help in recovery. Our team has successfully applied for and received \$100's of millions in funding for our clients to assist in recovery efforts.

IBTS is well-positioned to provide grant research and writing to supplement Islamorada grant efforts. We have a team of professional writers and researchers who are familiar with the tools used to identify grant opportunities (FedConnect, FedBizOpps, BidPrime, GovWin, GrantFinder, etc.) and processes to develop responses for grant applications.

Our grant support capabilities extend well beyond simply grant writing. In addition to a grant writing team, IBTS is a leader in disaster recovery services working with local governments across the country, including major storm events Hurricane Katrina, Hurricane Ike, Superstorm Sandy, Hurricane Harvey, and Hurricane Irma. We have been actively engaged in CDBG-DR programs and have more than 40 years' experience with HUD and FEMA.

We can draw on the firm's depth and expertise in disaster recovery, including having access to disaster rebuilding specialists, local government specialists, compliance specialists, code experts, grant managers, architects, engineers, and other industry specialists to inform our grant processes. This internal ability to collaborate on multiple topics to gain insight into specific topics has proven to be highly successful on all of our programs. To increase our value to the Village, we believe you should also benefit from our disaster recovery expertise, as well as our ability to identify and help write grant applications. We have multiple staff members who have led state and local programs. **To help understand the grant environment, IBTS is offering to conduct two presentations (at no cost to the Village) during our contract to help the Village understand how the disaster recovery programs work and how to optimize their opportunities.** The first presentation will be soon after contract award and will cover CDBG-DR

June 15, 2018

basics. At a later date (estimated to be at the six month mark), our subject matter expert will conduct a workshop to review the status of your current grant applications and provide insights into current grant trends/funding in the state of Florida.

In addition, as a nonprofit, IBTS can receive certain grant monies that are only available to nonprofits. We are eligible to apply for these on behalf of the Village and then serve as the subrecipient to administer the funds for you. This may open up additional funding sources for the Village. Currently IBTS functions as a subrecipient for CDBG-DR recovery in North Carolina, Cleveland County, Oklahoma, the Texas HOME Program, and the AmyYoung Barrier Removal Program.

We believe our combined experience and expertise makes us the best choice for your grant writing requirements. To improve recovery opportunities, it is essential that the Village be able to apply successfully for available grant monies from multiple entities: federal, state, and even corporate. Our offer is valid for 90 days.

Should you have any questions, please contact Steve Parisi via phone at 614.257.8356 or email at [sparisi@ibts.org](mailto:sparisi@ibts.org), or Chris Fennell via phone at 703.851.4187 or email at [CFennell@ibts.org](mailto:CFennell@ibts.org).

Thank you for this opportunity; we look forward to working with you.

Sincerely,



Christopher J. Fennell  
Chief Development and Marketing Officer



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June 15, 2018

# 1.0 Company Overview

IBTS is a nonprofit organization committed to helping communities through quality services that reduce risk, enhance public safety, and improve quality of life. We are a leading expert in disaster recovery services working with local governments across the country, including major storm events Hurricane Katrina, Hurricane Ike, Superstorm Sandy, Hurricane Harvey, and Hurricane Irma. We have been actively engaged in CDBG-DR programs, and have more than 40 years' experience with HUD and FEMA. As a result, we are familiar with the regulations and laws governing recovery projects and can bring our knowledge and expertise to Islamorada, helping you develop successful grant applications to achieve local goals.

As a nonprofit organization, IBTS' mission is to deliver services that meet the challenges of governance at the federal, state, and local levels while enhancing public safety, economic vitality, and general welfare. IBTS has the right mix of capabilities and demonstrated past experience helping other states and communities properly use their awarded grants by supporting and advising them in regulatory issues, program/grant management, program administration, finance, compliance, and all related tasks.

Incorporated in the Commonwealth of Virginia, IBTS was founded in 1974 and organized in its current structure in 1998. IBTS has approximately 350 employees and 100 field consultants available. The organization is headquartered in Ashburn, Virginia. We have offices in 10 regional locations, and 5 staff who are currently supporting efforts in the Florida Keys (Key Colony Beach and Marathon). We also have staff who live and work in Florida, including our proposed grant writer for this effort.

|                                  | Street Address                   | City/State            |
|----------------------------------|----------------------------------|-----------------------|
| <b>IBTS Headquarters</b>         | 45207 Research Place             | Ashburn, VA           |
| <b>Regional Office Locations</b> |                                  |                       |
| Regional Office – TX             | 3027 Marina Bay Drive, Suite 110 | League City, TX       |
| Regional Office – LA             | 3470 Industrial Drive            | Bossier City, LA      |
| Regional Office – LA             | 6703 Sullivan Road               | Central, LA           |
| Regional Office – NY             | 27 Cohoes Road, Suite 101        | Watervliet, NY        |
| Regional Office – NY             | 9201 4th Avenue, 4th Floor       | Brooklyn, NY          |
| Regional Office – NY             | 85 Broad Street, 29th Floor      | New York, NY          |
| Regional Office – NY             | 2537 Route 52, Suite #10         | Hopewell Junction, NY |
| Regional Office – OK             | 424 North Main Street            | Guymon, OK            |
| Regional Office – MO             | 600 Broadway Street, 3rd Floor   | Kansas City, MO       |
| Regional Office – DC             | 7059 Blair Road, NW, Suite 202   | Washington, DC        |



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IBTS has a Grant Services Department as part of its organizational structure, which is led by Chris Fennell, Chief Development & Marketing Officer. This department is supported by multiple professionals who are able to draw on the firm's depth and expertise in disaster recovery. It also has access to disaster rebuilding specialists, local government specialists, compliance specialists, code experts, grant managers, architects, engineers, and other industry specialists. This internal ability to collaborate on multiple topics to gain insight into specific topics has proven to be highly successful on all of our programs.



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## 2.0 Related Experience and References

As an organization, IBTS has written, submitted, and been awarded successful proposals since its inception in 1974. IBTS works with a variety of grant, contract, and service agreement models, including GSA schedule (GS-10F-0384M), as well as a contract with the Commonwealth of Virginia, Department of General Services.

### 2.1 Emergency Services, Key Colony Beach, FL

IBTS provided assistance and support for grants management and administration as needed for federal and state programs including: FEMA Public Assistance Program; FEMA Hazard Mitigation Program (HMGP); other federal disaster programs. We focused on maximizing eligible, allocable federal dollars. We created efficient processes to reduce the timeline for eligibility determinations in supporting project cash-flow sources and uses. IBTS provided technical knowledge and experience to develop and implement the framework of grant activities. We prepared, submitted, and tracked HMGP applications required by FEMA and other agencies and reviewed eligibility issues and developed justifications for presentations to FEMA and other agencies. "Hiring IBTS has already proven to be beneficial to our community. Their team has documented four times the amount of damages than we expected and we know that this work will help Key Colony Beach recover faster with fewer costs to the City"

#### Reference

##### Emergency Services, Key Colony Beach, FL

Chris Moonis, City Administrator

P.O. Box 510141, 600 West Ocean Drive Key  
Colony Beach, FL 33051-0141

305.289.1212 ext. 2

cmoonis@keycolonybeach.net

Period of Performance: November 2017 – April  
2018

### 2.2 FEMA Grant Writing

IBTS collaborated with CAL FIRE to write a grant application to the US Department of Homeland Security/FEMA for CAL FIRE in support of enhancements to Govmotus-Fire, a program that will allow CAL FIRE to link to all existing GIS information. The grant value was \$262,698.00. This application is pending.

#### Reference

##### California Department of Forestry and Fire Protection (CAL FIRE)

Stephen C. Guarino, Chief

1416 9th Street  
Sacramento, CA 94244

916-341-6641

Steve.guarino@fire.ca.gov

Period of Performance: February - March 2018



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### 2.3 Oklahoma Department of Transportation

We worked with the City of Pryor Creek, OK, on an application in support of the Transportation Alternatives Program, the first phase of a community-wide trail system. The program was administered by the Oklahoma Department of Transportation and the monies awarded were federal pass-through funds. The application was successful with a value of \$600,000. The project is currently out for a construction bid.

#### Reference

##### City of Pryor Creek, OK

Jimmy Tramel, Mayor

12 North Rowe Street, Pryor Creek, OK 74361

918-825-0888

tramelj@pryorcreek.org

Date of performance: August, 2016

### 2.4 Center for Disease Control (CDC)

IBTS wrote successful grant applications to the Center for Disease Control (CDC) for a Community Transformation Grant for healthy living programs within four communities located within the Cherokee Nation (Tahlequah, Pryor Creek, Stillwell and Nowata, Oklahoma). The applications resulted in grants with a value of \$217,000.

#### Reference

##### Cities of Tahlequah, OK

Jason Nichols, Mayor

111 S Cherokee, Tahlequah, OK 74464

918-456-0651

mayor@cityoftahlequah.com

Period of Performance: 2014

### 2.5 City of Central Flooding

The IBTS City of Central team has performed municipal services for the City since 2011 under a nonprofit-public partnership contract. When the City of Central was inundated with nearly six feet of water during the historic August 2016 flood, our Central team – members of the community themselves – put IBTS's full offering of disaster management services to work, partnering with municipal leaders through disaster response and recovery efforts. As the City of Central continues to rebuild and grow, IBTS is working to integrate resilience into the City's long-term recovery efforts so they build back stronger and better able to respond to natural disasters in the future. We have enhanced the drainage maintenance plan by expediting maintenance schedules, prioritizing problem areas, and coordinating with FEMA, GOHSEP, and USACE to maximize reimbursable monies.

#### Reference

##### City of Central, LA

Jr. Shelton, Mayor

13421 Hooper Road, Suite 9  
Central, LA 70818

225-936-9687

Jr.Shelton@central-LA.gov

Period of Performance: August 2016 –  
September 2017





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## 3.0 Service Approach

### 3.1 Project Understanding

Islamorada, like all the jurisdictions in the Keys has suffered from multiple weather events that have affected the infrastructure and economy of the community. To improve recovery opportunities, it is essential that the Village of Islands be able to apply successfully to available grant monies from multiple entities: federal, state, and even corporate.

The IBTS team has significant experience working in the Keys. We are working with the Cities of Key Colony Beach and Marathon providing recovery services related to Hurricane Irma. This has allowed IBTS to become acutely aware of the issues that Islamorada and all the Keys are experiencing.

In particular, we know that recovery funding is crucial for communities when disaster affects residents, infrastructure, and the economy. The federal and state governments offer help, but that help comes with many regulations regarding what can be done and how funding can be applied. Many jurisdictions simply do not have the resources or the knowledge to take advantage of what is offered in a timely manner, especially when already dealing with the many complications caused by the event. The funding sources available all have different uses and advantages. Unfortunately, they also come with their own unique requirements and compliance regulations.

The best tool for applicants is information. Good information allows good decision-making processes as to which programs and projects make the most sense for Islamorada. A comprehensive grant application with verifiable data also sets the stage for thorough documentation and compliance throughout the entire grant process. It helps ensure timely funding, proves eligibility assists, with compliance.

IBTS is well aware of the issues associated with getting grant funding. We have staff who have been responsible for recovery from major disasters – Hurricanes Katrina, Ike, Harvey, and more. They are intimately familiar with the intricacies of applying for and using multiple grant funds to help in recovery.

As a result of their experience with these processes, we know that it often takes more than one funding source to establish a complete project. There is an art to in mixing funding sources while also meeting federal/state regulations and policies for each program. In many cases, federal and state programs require matching funds. It is important to understand what can be used for matching and what cannot. CDBG and CDBG-DR funds are one of the only federal programs that can be used for the non-federal match. In cases where it is necessary to match FEMA dollars or USDA dollars, CDBG and CDBG-DR funding can be very useful. We know how to address the multiple challenges associated with applying for grants, as well as how to manage multiple funding sources.

In addition, as a nonprofit, IBTS can serve as a subrecipient for grant funding on behalf of Islamorada. This opens up additional funding sources for the Village. Currently IBTS functions as a subrecipient for CDBG-DR recovery in South Carolina, and Cleveland County, Oklahoma.

Benefits to a jurisdiction such as Islamorada using a subrecipient to carry out grant consulting, grant writing and grant management include:

- ▶ As a nonprofit, the goal is to use grant money efficiently and increase the amount of funding, rather than maximizing program management fees. This translates to lower costs for grant management and more money allocated to recovery projects.



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- ▶ There are no owners or stockholders, only stakeholders. Stakeholders include the citizens of the community and the members of the nonprofit. With no legal ability or desire to profit personally, all attention is focused on helping communities rebuild, using grant money effectively and determining additional funding sources.
- ▶ Specifically concerning grant consulting and management, the ultimate goal to assist the community by providing lower cost services, speeding recovery and protecting the community's interest above all else. In contrast, for-profit corporations must always be mindful of shareholders and owners, and may put those interests first.

The nonprofit model also allows a SME-driven project team, bringing senior staff as needed to assist the grantee as we have proposed for the Village of Islands. Using focused, SME experience brings better results focused on your community's recovery.

When the values of the nonprofit support the community's goals and needs it is a mutually beneficial relationship leading to:

- ▶ Less cost
- ▶ Intensified grant management and consulting Skills
- ▶ Focused management team
- ▶ Magnified use of grant funds
- ▶ Quicker and stronger recovery
- ▶ Enhanced communication
- ▶ A Community-first philosophy
- ▶ Protection of community interests

### 3.2 Staffing

IBTS has identified experienced staff who are available to support this effort. All staff proposed are full-time employees. Because they work as recovery grant subject matter experts, consultants and writers all the time, their training and experience are current. They are familiar with search tools used to identify grants and have experience developing tailored searches to identify information of interest. Our grant support capabilities extend well beyond simply grant writing. In addition to a grant writing team, IBTS is a leader in disaster recovery services working with local governments across the country, including major storm events Hurricane Katrina, Hurricane Ike, Superstorm Sandy, Hurricane Harvey, and Hurricane Irma. We have been actively engaged in CDBG-DR programs and have more than 40 years' experience with HUD and FEMA. This means our grant team has access to subject matter experts (SMEs) who can assist them as needed.

We have established processes for tracking all work assignments and providing necessary backup, as needed. This includes instances in which multiple projects are underway simultaneously or when a staff member is out of the office. While we will assign a primary resource to Islamorada, he will have access to several grant proposal writers, researchers who can be available on an as-needed basis, as well as reachback to our subject matter experts who have experience with a wide-range of critical funding agencies, such as FEMA, HUD, and state programs, as well as the respective agency's grant process. We will notify the Islamorada staff of any planned absences and make arrangements for back-up support. This process ensures there are never any gaps in support and allows for adequate planning to meet requirements.



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For this effort, we are proposing a team approach to supporting the Village.

**Shaun McLain, Grant Writer.** Mr. McLain is a Florida resident and is available to meet with Islamorada staff as needed. He has over 25 years of experience in proposal and grant writing, with 12 years of working in and researching disaster recovery programs. He understands the programs available to Village of Islands as well as the steps needed to take advantage of them.

Mr. McLain has crafted numerous responses to disaster recovery Requests for Proposals (RFP), and performed as technical editor for housing surveys, CDBG-DR Action Plans, procurement documents, HUD's National Disaster Resiliency Competition, and RFPs. Mr. McLain is familiar with the entire disaster recovery process, from the initial response through long-term recovery.

He has worked directly with clients such as the State of New Jersey and New Mexico to construct Action Plans and National Disaster Resiliency Competition (NRDC). These programs involved extensively data gathering and organization for submission packages under short deadlines. It also involved interviewing and coordinating with client personnel and our in-house subject matter experts to determine the best course forward. (Full resume in Section 8.o, Other Information)

Our proposed researcher and supplemental grant writer work at our corporate headquarters in Ashburn, Virginia.

**Christian Mottl, Researcher.** Mr. Mottl is an IBTS full-time market research analyst. He develops strategies for business opportunities, reviews RFP/Qs to assess appropriateness of responses, and participates and collaborates in capture meetings to discuss results with other internal stakeholders, senior managers, and executives. Mr. Mottl is well versed in the use of GovWin, FedBizOpps, and other tools to identify potential funding opportunities. He assists capture managers with the capture process, including participating in meetings and phone conferences with potential clients, teaming partners, and overall business outreach. Mr. Mottl has a BS in Marketing from George Mason University. (Full resume in Section 8.o, Other Information)

**Susanne Kohl-Parker, Supplemental Grant-Writer.** Ms. Kohl-Parker is a full-time employee with experience across a range of grant writing efforts, including HUD, SAMHSA, CDC, OJJDP, AmeriCorps, and education initiatives, supported by an array of public, private and corporate supporters.

Before coming to IBTS, Ms. Kohl-Parker has dedicated her career to researching, writing and administering grants, including employment in that capacity with a municipality in Ohio. There, she supported the public works department, the department of parks and recreation, the economic development department as well as police and fire. Cumulatively, she was instrumental in securing over \$32M in public, foundation and corporate funding for various projects, to include economic development (airport upgrades, an industrial park; housing rehabilitation; neighborhood empowerment); public works; parks and recreation (trail head upgrades; bike racks at bus stops; gazebo); police and fire (training and equipment).

Ms. Kohl-Parker has an MA in Journalism from Ohio State University, an MS in Administration from Central Michigan University, and a BA in International Communications from Capital University.

We have identified five SMEs who will be available to provide specific guidance on different types of grants and the complexities of grant submissions to various federal and state agencies. Each of these individuals has specific experience relevant to obtaining and administering federal and state grants. They will be available to our grant writers and researcher to assist with insights into specific types of grants, as well as to review content to ensure we have designed a grant application that allows the Village to maximize its awards by leveraging every aspect of the grant's capabilities.



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**Robert Dennis, SME.** Mr. Dennis has more than 25 years of experience administering the State of Florida's HUD CDBG programs. He has been responsible for three federal CDBG programs (Small Cities, Disaster Recovery Initiative, and Neighborhood Stabilization). He helped revise the CDBG state statutes and administrative rules and write Florida's 2015-2020 Analysis of Impediments to Fair Housing Choice and Consolidated Plan both required for CDBG funding. He can provide in-depth insight into state-specific grant processes and regulations.

**Mike Spletto, SME.** Mr. Spletto brings 30 years of experience in the field of community development and administration of Federal grants. He has extensive knowledge of CDBG, CDBG-DR, FEMA, and HOME programs. Mr. Spletto has played a key role in many of the largest disaster recovery programs in the country and delivered numerous training sessions related to CDBG, CDBG-DR, HOME, lead-based paint, NEPA and HUD 24 CFR Part 58 requirements, Section 504, labor standards, HUD compliance monitoring, HQS, strategic planning, and other housing related topics. He has worked for local and State governments for nearly 20 years and provided disaster recovery consulting services for over 10 years. Mr. Spletto assisted in the oversight or management of over \$20 Billion in HUD disaster funding.

**Scott Myers, SME.** A Certified Community Developer, Mr. Myers has more than 20 years' experience as a CDBG specialist. Most recently, he served as the Director of Programs for the Oklahoma State CDBG program with an annual appropriation of \$12.5 million and the state's CDBG-DR program of over \$93 million. He also oversaw the Neighborhood Stabilization (NSP 1 and 3) programs; the CDBG-Stimulus program, and the state appropriated Rural Economic Action Plan (REAP) grant program. Mr. Myers led the application submission under the competitive National Disaster Resiliency Competition (NDRC) program by HUD. He has also served as a CDBG-DR Program Manager in Cleveland County, Oklahoma and for the State of South Carolina.

**Shaurice Mullins, SME.** Ms. Mullins is a Certified Emergency Manager (CEM) with 14 years of experience in all facets of disaster mitigation and recovery. She is skilled in federal grant formulation and technologies that position communities and infrastructures to recover and rebuild following disasters. Ms. Mullins has a proven performance record in FEMA's PA program, IA program, and specific hazard mitigation programs that require benefit cost analysis (BCA). This experience has allowed Ms. Mullins to develop the capabilities and tools to administer and/or support recovery operations following a presidential declared disaster, including the writing and versioning of project worksheets (PWs). In addition, she is familiar with HUD's CDBG-DR Program and has served in numerous capacities in recovery work for five major hurricanes (Irma, Matthew, Sandy, Irene, and Floyd) and several severe storms, tornadoes, straight-line winds, and flooding events.

**Steve Green, SME.** Mr. Green has more than 25 years' experience establishing and implementing financial processes and controls for CDBG-DR funded projects. These processes and controls must comply with all federal, state, and local regulations and supply accurate and current financial data for reporting and program management requirements. He is also responsible for providing financial and other required information as needed for HUD DRGR performance reports. Additional duties include the establishment and oversight of the anti-fraud, waste, and abuse policies and processes on these projects to help ensure that funds are spent on eligible activities benefitting only qualified applicants. This includes developing relationships and coordination with the appropriate federal, state, and local enforcement agencies. Mr. Green also participates in the establishment of program policies and procedures to confirm compliance with all applicable regulations that program expenditures are allowable and eligible. Mr. Green has worked on financial project management for several disaster recovery projects including Galveston and Harris County, Texas; Minot, North Dakota; the State of Illinois; and the State of New Jersey.

### 3.3 Management

**People.** IBTS' management approach to this effort is to push responsibility and authority down to our primary grant writer. We minimize corporate overhead by making corporate staff available to answer questions or address any issues that might arise in the course of the contract, but without incurring any charges to the contract.



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Mr. McLain will coordinate directly with the Village Procurement and Grants Administrator (or other designated Village staff member) to identify opportunities, develop writing plans and schedules, and establish reviews. He will also have the ability to reach back to our SMEs for advice on specific grants or grant writing requirements, rules, and regulations to ensure all applications are compliant. Our SMEs will also be on call to the Village to answer questions.

Disaster recovery program management is one of IBTS' core competencies. We are well aware of the complex combination of grant programs and have multiple staff members who have led state and local programs. **To help understand the grant environment, IBTS is offering to conduct two presentations (at no cost to the Village) during our contract to help the Village understand how the programs work and how to optimize their opportunities.** The first presentation will be soon after contract award and will cover CDBG basics. At a later date (estimated to be at the six month mark), our SME will conduct a workshop to review the status of your current grant applications and provide insights into current grant trends/funding in the state of Florida.

**Processes.** Upon contract award, Mr. McLain will coordinate a kickoff meeting with the Village staff to meet them, discuss their preferences, processes and procedures, and collaborate with them to develop an initial action plan for grant researching and writing. He will also use this meeting to establish a plan for coordinating writing efforts and establishing reporting requirements and coordination meetings.

**Support Tools.** IBTS has policies and procedures that support remote work. As a result, our staff have access to a suite of communications tools including WEBEX, Skype, and teleconferencing numbers to make it easy to collaborate with Village staff.

### 3.4 Quality Control Process

Once this project is in place, IBTS will establish internal processes to ensure all work is tracked and delivered on time. We will vet opportunities and, every week, will send Islamorada staff a summary list of all opportunities identified as well as those vetted. Opportunities that appear to be a very good fit for the Village's identified present and future projects will be sent to your staff within 48 hours of identification, which will allow IBTS to create an outline that succinctly describes the opportunity's criteria for funding so the Village can make a determination about pursuing an application.

The grant writer maintains a checklist for each project to ensure we gather, complete, and assemble all relevant, required documentation for the application package.

We maintain a schedule for each project so we can meet review checkpoints to ensure we submit all packages on time, either electronically or in hard copy. This means we set our completion date based on whether or not an application can be emailed or uploaded to a site, or has to be shipped to the granting agency.

We allow time in our schedule for narrative documents to be edited and proofread so the document is clear, concise, and correct. We will also allow time in the schedule for document review by the Village staff. We know it is important to deliver quality products each and every time we develop a grant package.

### 3.5 Project Approach

We know the Village must rely on federal, state, and, but not as significantly, on corporate and foundation support. When a jurisdiction has suffered a disaster, it may not be possible to assign the resources to identify and this funding. This can result in missing out on thousands, if not millions, of third party support dollars. In addition, local staff may not be familiar with all the rules and requirements associated with federal grant applications. IBTS has a structured approach to researching and writing grants, as well as staff who are trained to identify and develop grants for local governments.



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Our project approach will focus on supporting and supplementing your existing staff with our personnel. We can modify our approach to meet your current processes and procedures.

**Research.** The first step to identifying grant opportunities for Islamorada's for representatives from the IBTS Grant Services Department and Disaster Recovery Division to meet with local staff to ensure that we have a clear understanding of interests and key topics for each of the Village's departments/divisions. Within two weeks of contract award, IBTS will coordinate a meeting with Islamorada's department heads, as well as lead staff, to introduce the IBTS grant researchers/writers to the Village of Island's team, and learn about your present needs and future plans. This will prepare the IBTS team to conduct targeted research in terms of funding opportunities that align with your objectives.

IBTS has paid subscriptions to FedConnect, FedBizOpps, BidPrime, GovWin, and GrantFinder. Both our grant writers and researchers have access to these tools and use them to identify and track opportunities. They register for alerts on opportunities of interest so when/if a change occurs, they receive an email that provides a link to the updated funding source. Each of our grant team members is trained on how to use the tools and knows how to perform searches (e.g., searching on terms aligned to topics about which the client has interest, such as public works, recreation, economic development, police and fire).

In addition, IBTS receives daily notifications from grants.gov. Our grant writer, as well as researchers, routinely conduct daily reviews of opportunities listed in the above-referenced tools.

Weekly, IBTS will forward a list of all opportunities IBTS identified, broken out by the opportunities deemed relevant versus those that were deemed not applicable. This report will show the granting organization, the topic, any special requirements, and the due date for the grant application. We will coordinate meetings (frequency to be determined) to review the report and determine/select opportunities to further develop and submit.

Once IBTS and the Village identify an opportunity of interest, IBTS will provide a detailed description of the opportunity's criteria and timeline. We will send this description to the Village staff within 48 hours of the initial decision.

**Grant Writing.** Once the Village has decided to pursue a grant opportunity, the IBTS grant writers will take the following steps to complete the application:

- ▶ Download all applicable grant materials and review them in detail.
- ▶ Develop a checklist of requirements to ensure the response is compliant and develop an outline of the response.
- ▶ Interview relevant Village staff and stakeholders.
- ▶ Begin filling out all forms and write a first narrative draft.
- ▶ Work with Village staff to complete the necessary forms and coordinate required signatures in time to meet all due dates.
- ▶ Provide Village staff with three rounds of edits to the narrative part of the application.
- ▶ If and when requested, IBTS will submit the application.



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**Maintaining Documentation.** IBTS maintains a document library that allows staff to easily access standard forms, narratives and budgets and to also add new forms and information as they become available. IBTS maintains these documents in a secure, collaborative worksite. IBTS staff accesses these files via a secure network connection.

On its secure, cloud-based server, IBTS will host an “Islamorada Grants” folder that will hold subfolders, one for each application in progress or submitted; one for background information such as the Village’s history, demographics, strengths and weaknesses; one for financial data such as budgets and tax returns; one for staff and community stakeholder resumes; one for forms, which IBTS will populate with every application the Village submits.

As appropriate, we will coordinate reviews of the grants effort to determine how to continuously improve our service.



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## 4.0 Cost Proposal

IBTS's hourly rates are provided below.

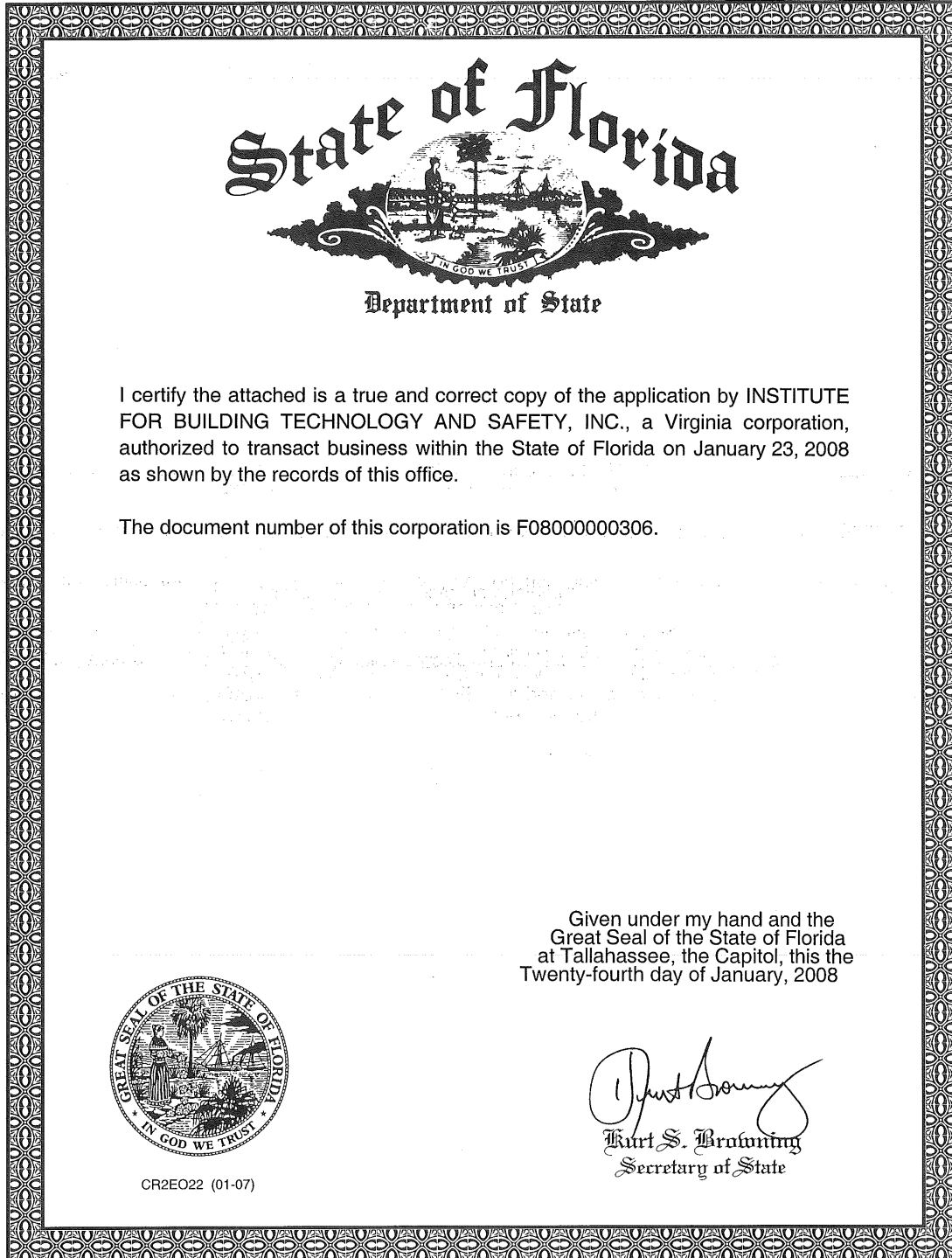
| LABOR CLASSIFICATION        | HOURLY RATE |
|-----------------------------|-------------|
| <b>General Services</b>     |             |
| Grant Writer 1              | \$150.00    |
| Grant Writer 2              | \$125.00    |
| Researcher                  | \$70.00     |
| <b>Specialized Services</b> |             |
| Principal                   | \$200.00    |
| Grant Program Manager 1     | \$180.00    |
| Grant Program Manager 2     | \$160.00    |
| General Support Services    | \$145.00    |
| Grant Implementation SME 1  | \$185.00    |
| Grant Implementation SME 2  | \$150.00    |
| Admin                       | \$60.00     |



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## 5.0 State Certifications


A copy of IBTS's Certificate of Authority to transact business in Florida is included below.



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# 6.0 Insurance

A copy of IBTS's Certificate of Insurance is included below.

|   |   |   |   |                                   |   |
|---|---|---|---|-----------------------------------|---|
|    |   | <b>CERTIFICATE OF LIABILITY INSURANCE</b> |   | DATE (MM/DD/YYYY)<br>5/31/2018    |   |
| 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.   |   |   |   |                                   |   |
| <b>IMPORTANT:</b> 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).  |   |   |   |                                   |   |
| <b>PRODUCER</b><br>Commercial Lines - (202) 783-5810<br>USI Insurance Services National, Inc.<br>601 13th St NW<br>Washington, DC 20005   |   |   | <b>CONTACT</b><br>NAME: Katelyn McCunniff<br>PHONE (A/C, No, Ext): 202.424.2723 FAX (A/C, No):<br>E-MAIL ADDRESS: katelyn.mccunniff@usi.com   |                                   |   |
| <b>INSURED</b><br>Institute for Building Technology & Safety<br>45207 Research Place<br>Ashburn VA 20147  |   |   | <b>INSURER(S) AFFORDING COVERAGE</b><br>INSURER A: Hartford Fire Insurance Company 19682<br>INSURER B: Twin City Fire Insurance Company 29459<br>INSURER C:<br>INSURER D:<br>INSURER E:<br>INSURER F: |                                   | <b>NAIC #</b>   |
| <b>COVERAGES</b>  |   | <b>CERTIFICATE NUMBER: 13088739</b>       |   | <b>REVISION NUMBER: See below</b> |   |
| 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. |   |   |   |                                   |   |
| <b>INSR LTR</b>   | <b>TYPE OF INSURANCE</b>  | <b>ADDITIONAL SUBROGATION</b>             | <b>POLICY NUMBER</b>  | <b>POLICY EFF (MM/DD/YYYY)</b>    | <b>POLICY EXP (MM/DD/YYYY)</b>  |
| A   | <input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b><br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC<br>OTHER: |   | 42 UUN NL3209   | 11/1/2017                         | 11/1/2018   |
|   |   |   |   |                                   | EACH OCCURRENCE \$ 1,000,000<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000<br>MED EXP (Any one person) \$ 10,000<br>PERSONAL & ADV INJURY \$ 1,000,000<br>GENERAL AGGREGATE \$ 2,000,000<br>PRODUCTS - COMP/OP AGG \$ 2,000,000<br>\$ |
| B   | <input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b><br><input checked="" type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS<br><input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY                          |   | 42 UEN NL3138   | 11/1/2017                         | 11/1/2018   |
|   |   |   |   |                                   | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$<br>\$   |
|   | <input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR<br><input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE<br>DED RETENTION \$  |   |   |                                   | EACH OCCURRENCE \$<br>AGGREGATE \$<br>\$  |
|   | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below   | Y/N<br>N/A                                |   |                                   | <input type="checkbox"/> PER <input type="checkbox"/> STATUTE <input type="checkbox"/> OTHER<br>E.L. EACH ACCIDENT \$<br>E.L. DISEASE - EA EMPLOYEE \$<br>E.L. DISEASE - POLICY LIMIT \$  |
| <b>DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)</b><br>RFQ 18-16 Islamorada, Village of Islands<br>Evidence of Coverage   |   |   |   |                                   |   |
| <b>CERTIFICATE HOLDER</b>   |   |   | <b>CANCELLATION</b>   |                                   |   |
| Islamorada, Village of Islands<br>86800 Overseas Highway<br>Islamorada, FL 33036  |   |   | 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<br>   |                                   |   |

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June 15, 2018

## 7.0 Compliance

IBTS understands we will be responsible for compliance with all permit requirements, laws, ordinances, rules, regulations and lawful orders of any public authority bearing on the performance of the services, and that Islamorada will not be responsible for monitoring our compliance with any laws or regulations.



June 15, 2018

## 8.0 Other Supporting Documentation

On the following pages please find Mr. McLain and Mr. Mottl's resumes and Addendum No. 1 dated May 23, 2018 and Addendum No. 2 dated June 8, 2018. Copies attached.



June 15, 2018

**Shaun McLain**  
Grant Writer

## Qualification Summary

Mr. McLain has over 25 years of experience as a technical/grant writer and professional services marketer, and over nine years of experience related to FEMA and CDBG disaster recovery services. He has crafted numerous responses to disaster recovery Requests for Proposals (RFP) and performed as technical editor for housing surveys, CDBG-DR Action Plans, procurement documents, and HUD's National Disaster Resiliency Competition (NRDC). Mr. McLain is familiar with the entire disaster recovery process, from first response to the grant close out process. He has teamed with subject matters experts (SMEs) Michael Spletto and Steve Green over the past decade and currently works with all IBTS SMEs proposed for Islamorada on disaster recovery projects and proposals nationwide.

Mr. McLain has performed as proposal manager, writer and/or technical editor for a variety of clients. Efforts have included a \$40 million disaster recovery project in Nassau County, New York, as well as disaster recovery projects in Florida, Colorado, St. Bernard Parish, Louisiana, and Jefferson Parish, Louisiana.

### Education & Certifications

B.S. Journalism, Bowling Green State University

Certified Professional Services Marketer

## Professional Experience

### Technical Editor, State of New Mexico HUD NRDC Phase 2

For the State of New Mexico, Mr. McLain served as the technical editor for the application of Phase 2 of HUD's NDRC. The program presented interrelated projects is designed to increase watershed health in the Upper Rio Grande Watershed which supplies drinking water to one third of the state. The program represented a synchronized, holistic approach to rehabilitating the watershed, which had been devastated by a series of intense wildfires, followed by massive flooding. New Mexico requested over \$105 million in grants to provide proactive solutions to help mitigate the effects long-term drought, severe wildfire, and resulting flood damage.

### Technical Editor, New Jersey Department of Community Affairs Hurricane Sandy CDBG Action Plan, State of New Jersey

Mr. McLain served as the technical editor in the effort to create the New Jersey CDBG-DR Action Plan, which outlined the uses of approximately \$1.8 billion in CDBG-DR funding for Superstorm Sandy recovery programs. Programs created included housing rehabilitation and reconstruction, rental unit rehabilitation and reconstruction, infrastructure repairs and economic development assistance. Mr. McLain also reviewed the needs analysis and procurement documents provided to contractors.

### Technical Editor, City of Minot CDBG Action Plan, Minot, ND

Following record flooding the City of Minot received \$67.5 million in CDBG-DR funding. For the second round of funding, Mr. McLain served as the technical editor of the CDBG-DR Action Plan which served as the roadmap for programs such as repairing and expanding water and sewer service, providing infrastructure to develop affordable housing, and providing funding assistance to low-to-moderate income families to repair or reconstruct their homes.



June 15, 2018

**Marketing Specialist, Louisiana Land Trust Home Lot Program, State of Louisiana**

Mr. McLain coordinated a response to an RFP from the Louisiana Land Trust for the CDBG funded demolition of over 18,000 homes damaged or destroyed by Hurricane Katrina in southern Louisiana, one of the largest demolition programs ever undertaken in the country. He worked with CDBG specialists and SMEs to produce a winning submission for this \$95 million project.

**Marketing Specialist, Harris County Homeowner Disaster Recovery Program Harris County, Texas**

Following Hurricane Ike in 2008, Harris County received \$47 million in CDBG funds to help rebuild homes and issued an RFP for grant management. Working with CDBG specialists, Mr. McLain coordinated the winning response, which focused on how best to provide comprehensive grant management services, including Housing Assistance Centers, outreach programs to homeowners, municipalities, unincorporated areas, and property owners; construction oversight of home repairs and reconstruction and processing applications for financial assistance and determining amounts of assistance.



June 15, 2018

**Christian Mottl**  
Researcher

### Qualification Summary

Mr. Mottl's experience rests with sales/capture, marketing, and business development; to include online research and outreach, as well as in-person meetings. He has been trained and routinely uses multiple tools to identify proposal/grant opportunities for the firm's different lines of business.

#### Education & Certifications

BS, Marketing, George Mason University, 2018

### Professional Experience

#### June 2017 – Present // RESEARCH & BUSINESS ANALYST, FEDERAL & STATE PROGRAMS, IBTS

Conducts market research and develops strategies for potential business opportunities. Prepares "go or no-go" analyses on potential bids, reviews RFP/Qs to assess appropriateness of bidding, and participates and collaborates in capture meetings to discuss results with other internal stakeholders, senior managers, and executives. Uses GovWin, FedBizOpps, and other tools to identify potential opportunities. Assists Capture Managers with the capture process, including participating in meetings and phone conferences with potential clients, teaming partners, and overall business outreach.

#### August 2015 – June 2017 // MEMBER SERVICES REPRESENTATIVE, PRINCE WILLIAM COUNTY EMPLOYEES CREDIT UNION

Executed financial transactions accurately and efficiently for member base. Engaged as a brand ambassador by providing and promoting products and services to consumers. This was accomplished through literature distribution, cold calling, client networking, and interactions in general. Counseled upper management in branding and marketing by advocating for innovative and cost-effective ways to establish a corporate presence in the community. Assisted members in assessing their financial needs and provided the best products for each individual.



June 15, 2018



**ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA**

**ADDENDUM NO. 1**

**CLARIFICATION TO**

**REQUEST FOR QUALIFICATIONS**

**FOR**

**GRANT WRITING CONSULTING AND SUPPORT SERVICES**

**(RFQ 18-17)**

***ISSUE DATE: MAY 23, 2018***

**This Addendum forms a part of the Request for Qualifications (RFQ) and clarifies the original RFQ. Clarifications do not cancel any other portion(s) of the RFQ, including other portions of affected Sections listed below, unless otherwise noted.**

**The RFQ is hereby clarified as follows:**

**Question:** Whether companies from Outside USA (like from India or Canada) can apply for this?

**Answer:** Any person or entity may submit a proposal in response to the RFQ. The Evaluation Committee will review all proposals for responsiveness to the RFQ and subsequently determine whether proposals meet the needs of the Village for consideration.

**Question:** Whether we need to come over there for meetings?

**Answer:** The RFQ states, "Through interviews and meetings with Village staff and officials, the grant writer(s) will be expected to understand the scope and concept of a project or program in order to be able to identify applicable grant funding sources that might be available." Proximity of the contractor to the Florida Keys and ability to meet on-site with staff may be a factor that the RFQ Evaluation Committee agrees is an important consideration when comparing proposals.

**Question:** Can we perform the tasks (related to RFP) outside USA (like, from India or Canada)?

**Answer:** The RFQ states, "Through interviews and meetings with Village staff and officials, the grant writer(s) will be expected to understand the scope and concept of a project or program in order to be able to identify applicable grant funding sources that might be available. The grant writer will be expected to compile information, including project or program budget information, and write and edit local, state and federal grant applications exhibiting strong writing skills and an excellent command of grammar and spelling." Ability of the proposer, whether located in the United States of America or in a foreign country, to meet these expectations will need to be conveyed sufficiently through the proposal document. Proximity of the contractor to the Florida Keys and ability to meet on-site with staff may be a factor that the RFQ Evaluation Committee agrees is an important consideration when comparing proposals.



June 15, 2018



**ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA**  
**ADDENDUM NO. 2**  
**CLARIFICATION TO**  
**REQUEST FOR QUALIFICATIONS**  
**FOR**  
**GRANT WRITING CONSULTING AND SUPPORT SERVICES**  
**(RFQ 18-17)**

***ISSUE DATE: June 8, 2018***

**This Addendum forms a part of the Request for Qualifications (RFQ) and clarifies the original RFQ.**

**The RFQ is hereby clarified as follows:**

- 1. Question:** What type of work or retrofit projects is the Village considering for grant funding?

**Answer:** The Village is considering mainly mitigation projects to be funded by federal grant programs.

- 2. Question:** What entities is the Village considering applying funding from (i.e. FEMA, CDBG, Water Management District, NRCS, FDEP, FDOT, etc.)?

**Answer:** The Village is considering applying for funding from all the entities listed above.

- 3. Question:** Many grant firms also administer grants they help win. Will the government confirm that the successful grant writing team will also be eligible to administer awarded grants?

**Answer:** Yes, on a case by case basis

\* \* \*



Institute for Building Technology and Safety  
3027 Marina Bay Drive, Suite 110  
League City, TX 77573  
713.955.7287  
[www.ibts.org](http://www.ibts.org)