

### County of Hernando

# Procurement Department

Toni Brady, Chief Procurement Officer 15470 Flight Path Drive, Brooksville, FL 34604

### PROPOSAL DOCUMENT REPORT

RFP No. 23-RFPG00380/FH

Community Development Block Grant (CDBG) Grant Administration FFY2021/2022

RESPONSE DEADLINE: July 31, 2023 at 10:00 am Report Generated: Wednesday, November 29, 2023

# Guardian Community Resource Management, Inc. Proposal

### **CONTACT INFORMATION**

### Company:

Guardian Community Resource Management, Inc.

#### Email:

corbett.alday@guardiancrm.com

#### Contact:

Corbett Alday

#### Address:

15000 Citrus Country Drive Suite 331

Dade City, FL 33523

### Phone:

N/A

#### Website:

www.GuardianCRM.com

### **Submission Date:**

Jul 28, 2023 7:48 AM

### ADDENDA CONFIRMATION

Addendum #1

Confirmed Jul 7, 2023 10:32 AM by Marina Edwards

Addendum #2

Confirmed Jul 13, 2023 1:05 PM by Marina Edwards

Addendum #3

Confirmed Jul 27, 2023 3:43 PM by Marina Edwards

### QUESTIONNAIRE

#### 1. E-VERIFY CERTIFICATION\*

Pass

Vendor/Contractor shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

All persons employed by the Vendor/Contractor during the term of the Contract to perform employment duties within Florida; and

All persons, including subcontractors, assigned by the Vendor/Contractor to perform work pursuant to the Contract with the department.

Confirmed

### 2. ACH electronic payment \*

Pass

An ACH electronic payment method is offered as an alternative to a payment by physical check.

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Please check Option 1 if you accept the ACH electronic payment method.

(Recommended and Preferred)

Yes, ACH electronic payment method is acceptable.

#### 3. PROPOSER'S CERTIFICATION\*

Pass

I have carefully examined the Request for Proposals (RFP), Instructions to Proposers, General and/or Special Conditions, Specifications, RFP Proposal and any other documents accompanying or made a part of this invitation.

I hereby propose to furnish the goods or services specified in the Request for Proposals at the prices or rates quoted in my Proposal. I agree that my RFP will remain firm for a period of up to one hundred and eighty (180) days in order to allow the County adequate time to evaluate the Proposals. Furthermore, I agree to abide by all conditions of the Proposal.

I certify that all information contained in this RFP is truthful to the best of my knowledge and belief. I further certify that I am a duly authorized to submit this RFP on behalf of the Consultant/Firm as its act and deed and that the Consultant/Firm is ready, willing and able to perform if awarded the Contract.

I further certify that this RFP is made without prior understanding, agreement, connection, discussion, or collusion with any person, firm or corporation submitting a RFP for the same product or service; no officer, employee or agent of the Hernando County BCC or of any other Proposer interested in said RFP; and that the undersigned executed this Proposer's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

I further certify that having read and examined the specifications and documents for the designated services and understanding the general conditions for Contract under which services will be performed, does hereby propose to furnish all labor, equipment, and material to provide the services set forth in the RFP.

I hereby declare that the following listing states any clarifications, any and all variations from and exceptions to the requirements of the specifications and documents. The undersigned further declares that the "work" will be performed in strict accordance with such requirements and understands that any exceptions to the requirements of the specifications and documents may render the Proposer's Proposal non-responsive.

NO EXCEPTIONS ALLOWED AFTER THE RFP IS SUBMITTED:

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Please check one:

I take NO exceptions

#### 4. Exceptions

Pass

If you selected "Exceptions" in the preceding question, please enter any exceptions to this RFP

N/A

### 5. Drug Free Workplace Certification

Pass

I have read and attest to, in accordance with Florida Statute 287.087 (current version), hereby certify that,

Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.

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.

Gives each employee engaged in providing commodities or contractual services that are under proposal a copy of the statement specified above.

Notifies the employees that as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, pleas of guilty or nolo contendere to, any violation of Chapter 893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the workplace, no later than five (5) days after such conviction, and requires employees to sign copies of such written statement to acknowledge their receipt.

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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.

Makes a good faith effort to continue to maintain a drug free workplace through the implementation of the Drug Free Workplace Program.

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

Please Confirm that you have read and attest to Download Drug Free Workplace Certificate

Confirmed

### 6. Statement of No Proposal

Pass

No response submitted

### 7. "No Proposal" Explanation

Pass

Please provide any necessary explanation as to why you chose not to participate.

N/A

### 8. VENDOR/CONTRACTOR SURVEY \*

Pass

Please provide information on where you received the knowledge of the bid/request for proposals (mark all that apply):

OpenGov Procurement

### 9. VENDOR/CONTRACTOR SURVEY (OTHER)

Pass

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If you answered "Referred" or "Other" in the Survey, please specify:

N/A

### 10. Sub-Contractors/Sub-consultants:

Pass

The Hernando County BOCC reserves the right to approve all Sub-contractors and/or sub-consultants for this Contract. If Sub-contractors are to be utilized, their names and references must be included within this initial Proposal.

Proposers shall list all proposed Sub-Contractors to be used, regardless of racial or gender grouping. Include names, addresses, phone numbers, type of work Sub-Contracted (discipline, trade or commodity) and proposed percentage of work for each firm.

Gayle Brett, 7131 Towner Trace, Tallahassee, FL 32312,(352)-437-3902. Guardian intends to utilize the services of one sub-consultant, Ms. Gayle Brett.

Gayle is a licensed real estate agent, and provides technical assistance in instances where an applicant (homeowner) may need to provide extra or different information in order to be in compliance with CDBG rules and regulations. With HR CDBG programs, we do not expect to utilize her services unless there are special circumstances that need to be addressed, estimated at 5% or less of work required to manage the program. Gayle works for Guardian CRM exclusively.

### 11. VENDOR/CONTRACTOR INFORMATION\*

Pass

Please Provide the following Information:

- 1. Respondent/Vendor Contractor Name
- 2. Vendor/Contractor FEIN
- 3. Vendor/Contractor's Authorized Representative Name and Title

- 4. Address
- 5. Phone Number
- 6. Email Address
  - A. Guardian Community Resource Management, Inc.
  - B. 13-4309252
  - C. J. Corbett Alday Vice President & COO
  - D. 15000 Citrus Country Drive, Suite 331, Dade City FL 33523
  - F. 352-437-3902
  - F. corbett.alday@guardiancrm.com

### 12. Confirm 180 days proposal validity

Pass

Any Proposals shall constitute an irrevocable offer (including pricing), for a period of one hundred eighty (180) days, to provide to the County the services set forth in this Request for Proposals, or until one (1) or more of the Proposals have been awarded.

Confirmed

### 13. \*\*VENDOR/CONTRACTOR CERTIFICATION REGARDING SCRUTINIZED COMPANIES\*

Pass

Section 287.135 (Current Edition), Florida Statutes, prohibits agencies from contracting with companies for goods or services of \$1,000,000.00 or more, that are on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector Lists which are created pursuant to s. 215.473 F.S. (Current Edition), or the Scrutinized Companies that Boycott Israel List, crated pursuant to s. 215.4725 F.S. (Current Edition), or companies that are engaged in a boycott of Israel or companies engaged in business operations in Cuba or Syria.

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As the person authorized to submit bids on behalf of respondent, I hereby certify that the company identified above in the section entitled "Respondent Vendor Name" is not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List. I further certify that the company is not engaged in a boycott of Israel. I understand that pursuant to section 287.135 (Current Edition), Florida Statutes, the submission of a false certification may subject company to civil penalties, attorney's fees, and/or costs and does not have business operations in Cuba or Syria.

Confirmed

### 14. Affidavit of Non Collusion and of Non-Interest of Hernando County Employees\*

Pass

Affidavit of Non Collusion and of Non-Interest of Hernando County Employees

Certification that Vendor/Contractor affirms that the bid/proposal presented to the Owner is made freely, and without any secret agreement to commit a fraudulent, deceitful, unlawful or wrongful act of collusion.

I have read and attest that I am the Vendor/Contractor in the above bid/proposal, that the only person or persons interested in said proposal are named therein; that no officer, employee or agent of the Hernando County Board of County Commissioners (BOCC) or of any other Vendor/Contractor is interested in said bid/proposal; and that affiant makes the above bid/proposal with no past or present collusion with any other person, firm or corporation.

Please confirm that you have read and attest to Affidavit of Non Collusion and of Non-Interest of Hernando County Employees Confirmed

### 15. Proposal Principals \*

Pass

Please name all persons or entities interested in the Proposal as principals.

Provide name, title, mailing address, email address and phone number.

J. Corbett Alday III Guardian CRM, Inc., 15000 Citrus Country Drive, Suite 331, Dade City FL Corbett.Alday@Guardiancrm.com 352-437-3902

### 16. Technical Proposal\*

Pass

Please upload a single pdf Proposal package responsive to the tabs referenced in 17.1-17.6 in this vendor questionnaire section.

Technical Proposal.pdf

### 17. Proposal Format

The following information shall be submitted in all Proposer responses in the format as specified herein. Failure to submit the requested information in this format may result in a reduction in the evaluation points assigned to your Proposal.

# TAB 1 - STATEMENT OF INTEREST AND INTRODUCTION/LETTER OF TRANSMITTAL.\* Pass

The responding firm (or the lead firm if Sub-Contractors are proposed) will provide a letter, on company letterhead, not exceeding two (2) pages, which serves as a statement of interest and introduction to the submittal. If Sub-contractors are proposed, each Sub-contractor may provide a similar letter, not exceeding one (1) page. This letter will summarize in a brief and concise manner, the Proposer's understanding of the Scope of Work. The letter must name all of the persons authorized to make representations for the Proposer, including the titles, addresses, and telephone numbers of such persons. An official authorized to negotiate for the Proposer must sign the Letter of Transmittal.

TAB\_1\_Transmittal\_Letter\_jmr\_7-20-23.pdf

TAB 2 ORGANIZATION AND CAPACITY\*

Pass

Describe organization's capability to perform services. Provide description of the availability of the Proposer's assigned staff and client satisfaction with regard to service provided. Repetitive problems with responsiveness,

Community Development Block Grant (CDBG) Grant Administration FFY2021/2022

changes of staff, or delivery of timely and quality service based upon references, direct experience, or discussions with agencies will be considered. List any Sub-Contractors that may be used to accomplish these services.

TAB\_2\_i\_Firm\_Profile\_JMR\_7-23-23.pdfTAB\_2\_i\_Key\_personnel\_chart\_UPDATED\_JMR\_7-23-23.pdfTAB\_2\_ii\_Capacity\_4-5-2023\_JMR\_7-23-23.pdf

TAB 3 RESUME/STAFF QUALIFICATIONS\*

Pass

Identify staff to be assigned to the County's projects; provide detailed resumes including only practical, 'hands-on' experience. Hands-on experience with different aspects of single-family property REO's (Real Estate Owned) and other relevant skills will be considered. Any principals, managers, associates, Sub-Contractors, administrative and other organization staff not working on the County's project or with no practical 'hands-on' experience will be scored accordingly. 'Hands-on' shall mean personal experience of the key staff assigned to the County's projects with acquisition/rehabilitation/resale experience. Be sure to address any specific Proposals described above for your particular service.

TAB\_3\_ii\_Staff\_Bios\_JMR\_7-23-23.pdf

**TAB 4 REFERENCES\*** 

Pass

Provide all similar projects within the last five (5) years, inclusive of those specific to you service described above. Each project must include client contact names and phone numbers for both open and closed acquisitions, repairs and resales. Include brief descriptions of project. In addition, provide the length of the rehabilitation project and whether the work was performed on time and within budget. Please include a timeline, total project costs and all partners with primary contacts for each completed project.

TAB\_4\_References\_JMR\_7-23-23.pdf

TAB 5 APPROACH TO CDBG\*
Pass

Provide preliminary project ideas or samples and a detailed approach demonstrating some consideration and research by the Proposer into implementing the CDBG Grant Administration. Provide the steps your organization must take to implement the services you offer. Be sure to outline those steps specific to your service, described above. Provide any time-lines of any projects that are similar to these requirements and indicate your organization's ability to meet the time-lines. Identify any unanticipated factors along the time-line.

TAB 5\_i\_Approach\_JMR\_7-23-23.pdfTAB\_5\_ii\_Experience\_Chart\_JMR\_7-23-23.pdf

TAB 6 FINANCIAL INFORMATION\*

Pass

Provide an official letter from the Proposer's financial institution detailing the financial status of the Proposer. The letter shall include a contact name, address, phone number, and fax number. The failure to produce financial requirements may be grounds for disqualification of your offer.

HernandoWellsFargoLtr07072023\_JMR\_\_7-23-23.pdf

#### 18. Sworn Statement

SWORN STATEMENT SECTION 287.133 (3) (A)\*

**Pass** 

I have read and attest that I understand that a "public entity crime" as defined in Paragraph 287.133 (1)(g), Florida Statutes (current version), means a violation of any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

I have read and attest that I understand that "convicted" or "conviction" as defined in Paragraph 287.133 (1)(b), Florida Statutes (current version), means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any Federal or State trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

I have read and attest that I understand that an "affiliate" as defined in Paragraph 287.133 (1)(a), Florida Statutes (current version), 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 (1) person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one (1) 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.

I have read and attest that I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes (current version), means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which proposals or applies to proposal on contracts for the provisions of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

I have read and attest that based on information and belief, the statement which I have confirmed below is true in relation to the entity submitting this sworn statement:

\_\_\_\_\_ [attach a copy of the final order].

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH ONE (1) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31, OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT.

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

IF YOU CHOOSE OPTION 3, PLEASE ATTACH A COPY OF THE FINAL ORDER

The entity submitting this sworn statement, or one (1) or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted Vendor/Contractor list

### Please attach a copy of the final order

No response submitted

### 19. Authorized Signatures/Negotiators

AUTHORIZED SIGNATURES/NEGOTIATORS \*

Pass

Please provide the information to support the statement below:

The Vendor/Contractor represents that the following persons are authorized to sign and/or negotiate contracts and related documents to which the Vendor/Contractor will be duly bound:

Name(s)

Title(s)

Phone no (s)

J. Corbett Alday III Vice President & COO 352-437-3902

TYPE OF ORGANIZATION \*

**Pass** 

Select your organization's type below

### PROPOSAL DOCUMENT REPORT

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**COMPANY ID\*** 

Pass

Please Provide Your:

Company name

Address

Phone

Email

State of Incorporation and

Federal I.D. NO.

Please state if you collect Florida sales Tax.

Guardian Community Resource Management, Inc., 3020 Bruton Road, Plant City, FL 33565, 352-437-3902, christine@guardiancrm.com, FLORIDA, 13-4309252, NO

W-9\*

Pass

Please attach your W-9

fw9\_GCRM\_2023\_JMR\_7-23-23.pdf

### **REQUIRED GRANT FORMS**

**Pass** 

Prime-Certification Regardi...

- DBE-SUB Statement Form.pdf
- GOOD FAITH EFFORTS-with OSD...
- Certification for Disclosur...
- Exp 2-18-2025 Standard Form...
- HC Employment Disclosure St...

 $\label{lem:continuous} Prime-Certification\_Regarding\_Debarment\_Suspension\_and\_Other\_Responsibility\_Matters-sc37\_(1).pdfDBE-SUB\_Statement\_Form\_(1).pdfGOOD\_FAITH\_EFFORTS-$ 

with\_OSD\_(1).pdfCertification\_for\_Disclosure\_of\_Lobbying\_Activities\_(1).pdfExp\_2-18-2025\_Standard\_Form\_LLL\_-\_Disclosure\_of\_Lobbying\_Activities\_-\_SFLLL\_1\_2\_P-V12b\_(1).pdfHC\_Employment\_Disclosure\_Statement\_(1).pdf

### **PRICE TABLES**

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1	Agreement Administration Fees - • Representation during site visits • and monitoring visits • Oversight of project schedule and compliance • Coordination with other agencies and contracts • Develop and process amendments • Provide regular project status reports • Provide all other necessary technical assistance • Develop project information management & filing system • Develop work plan for project contract document • Oversight of citizen complaint process	1	EA	\$21,300.00	\$21,300.00
2	PROJECT DELIVERY SERVICES: • Review of project contract document • Review bid documents for compliance • Conduct and attend preconstruction conference • Monitor contractor performance and compliance • Environmental review • Request wage decisions • Review contract documents	1	EA	\$47,520.00	\$47,520.00

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Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
3	FINANCIAL ADMINISTRATION: • Develop project financial management system for receiving/disbursing funds • Supervision of payment authorizations • Maintain project account records • Monitor all project activity to ensure compliance • Develop budget for project contract • Budget tracking • Review change orders for compliance • Review amendments for compliance	1	EA	\$11,880.00	\$11,880.00
4	POST-PROJECT ACTIVITIES: • Review final change order and pay request • Gather all necessary supporting documents • Prepare documents for administrative/financial close out • Balance final project budget • Review final constr. doc • Final status report	1	EA	\$9,300.00	\$9,300.00
TOTAL	TOTAL				\$90,000.00



July 28, 2023

Hernando County Board of County Commissioners Erin Kluis Briggs, Grant Writer 15470 Flight Path Drive Brooksville, FL 34604 (352) 754-4778 ebriggs@co.hernando.fl.us

Dear Ms. Briggs and Selection Commission Members:

Guardian Community Resource Management Inc. (Guardian) is a full-service grant management firm incorporated in the State of Florida since 2005 and continuing to serve local governments throughout the state. As an industry leader, we are here to help you meet the increasing needs for improved affordable local infrastructure, economic development, housing, disaster recovery, utility financing, and the creation of high wage jobs in your community.

Guardian has over 150 years of combined team experience, and is a leader in grant research, planning, writing/application, and program administration services for federal and state-initiated programs such as **Small Cities CDBG**, State Housing Initiative Partnership (SHIP), Economic Development, Public Works, and State Revolving Fund, among others. We believe our ongoing involvement in similar communities involving federal and state grant program administration, and our intimate familiarity with the complexities of Federal and State regulations, especially those under HUD, makes us the best qualified firm to fulfill your needs. We have worked in cities, counties, and special districts throughout Florida. In short, when you are talking about overall experience from application to implementation of state and federal grant funded programs, you will not find a more experienced knowledgeable, dedicated, and ethical team than Guardian.

In 2009, Guardian began working for Hernando County organizing and providing program administration and project delivery services for NSP1 funds to be used as financing mechanisms for REO property purchases, REO-LMMI direct purchase assistance, acquisition housing rehabilitation and VLI rental housing. Guardian moved forward with Hernando, providing services for another NSP project as well as various CDBG Housing and Neighborhood projects throughout the years. The Guardian team continues to provide grant planning/application & program administration, contract prep & implementation, conducted household surveys, project inspections and financial management.

Based on our record with federal and state government funded projects, please know that when it comes to working with the Hernando County team, we will always respond professionally, and in a timely manner. We will act in the best interest of your community, without overstepping our responsibilities. We will provide you and your residents with the highest quality standards and service that make Guardian a leader in this industry.

At Guardian, we feel providing the **maximum accessibility** and **on-site capability** is critical to the successful management and completion of a project. **Because our team members live locally to our clients and work remotely,** they often work outside normal office hours and make every effort to respond to your calls or requests within 24 hours. Allowing our team to be completely mobile means we can go where the project needs attention, as well as interface regularly with the client.

Our office is staffed with full-time office professionals that provide support for our clients and for our other team members. The office is equipped with all the major technological equipment, including scanners, copiers, computers, servers, and more. All Guardian team members are technically connected to serve our clients in the field with; Encrypted flash drives, available for client privacy/protection, and portable printers and access to Guardian's **backup servers** to ensure all documentation is secure and maintained in accordance with all public records requirements.

We have successfully written and completed over 200 projects, totaling \$500,000,000+ in grants, loans, and private investment (the mixing, matching, and leveraging of multiple funding sources), with the majority involving CDBG, SHIP, FEMA PA, SRF, NSP, HOME, Disaster Recovery, EDA, and other community and economic development programs.

The Guardian Team encourages you to contact our references and confirm that when you partner with our firm, you get a team that is responsive, technically knowledgeable and committed to your success. We are local, housed in Dade City, Florida, with exclusive experience with housing, neighborhood, commercial revitalization, economic development, and Florida disaster recovery.

It is our pleasure to offer our continued services to Hernando County. This proposal is a firm offer of services and is irrevocable for a period not to exceed one hundred and eighty (180) days from the public opening date and time. I am the duly authorized representative to negotiate and legally bind Guardian in a contract, and I understand and agree to be bound by the terms and conditions of the RFP and addendums as presented. I certify that no lobbying of any Selection Commission members or the Employees of the County has taken place and professional silence concerning the RFP has been maintained during the RFP process. Further, I declare that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to the RFP.

Please do not hesitate to contact me should you have any questions or require additional information. We look forward to the opportunity to serve you and your community.

Sincerely,

J. Corbett Alday
President & COO
15000 Citrus Country Drive, Suite 331
Dade City, FL 33523
352-437-3902
Corbett.alday@guardiancrm.com



### **Organization Profile and Capacity**

Guardian Community Resource Management Inc. (Guardian) is a full-service grant management firm established in 2005 as a for-profit, S Corporation, and is a State of Florida Certified Minority/Women Owned Business. The Guardian Team is comprised of nine (9) veteran grant and management professionals. Our Team brings to your organization over 150+ years of combined expertise and handson experience working in the various areas of state and federal grants and loan-funded community development and affordable housing.

Our office is located at 15000 Citrus Country Drive, Suite 331, Dade County, FL 33523. Our office phone number is 352-437-3902, Toll Free 888-482-7393.













Each professional team member assigned to your projects:

- Holds a post-secondary degree, certification, or professional license.
- Years of experience working in the public sector yielding unique insight into knowing the level of quality, customer service & performance expected from our clients.
- Is dedicated to the success of all our clients' projects.

#### Ready to Proceed and Ready to Serve!

All Guardian team members are technically connected to serve our clients in the field with:

- Fully equipped laptops and wireless broadband internet access in addition to the full suite of Office products and other standard software,
- Encrypted flash drives available for client privacy and protection, a cellular phone, limited office supplies, and where needed portable printers.
- Access to Guardian's backup servers to ensure all documentation is maintained in accordance with all public records requirements.
- Toll free phone number accessible to not only Guardian clients but to all individuals, contractors and vendors that may be requesting assistance through the local governments and or agencies.

From its inception, the Guardian Team has worked **for local governments** to develop and provide grant research, planning, grant application preparation, leverage strategies, program administration and management and construction oversight services.

Our full-service grant management includes, but is not limited to:

- o Grant research, project planning, grant application writing, planning, & budgeting new prog.
- o Developing grant funding/leveraging strategies, including loans/layering of other funds.
- o Preparing HUD and NEPA Environmental Reviews (ERR) at all levels.
- o Reviewing/updating various local grant related policies/procedures as required.
- Preparing Request for Funds, invoices, & approvals for expenditures.
- o Establishing necessary policy and procedures, best practice client and administration files.
- o Fiscal management of all funds, including match, leverage, change orders, pay requests.
- o Preparing RFP for procurement of contractors, engineers, vetting, bid invitations.
- o Attending pre-bid conference, bid opening/pre-construction meeting, developing contracts.
- Assisting in/ preparing for required Fair Housing activities; preparing grant amendments, monthly, quarterly, close out reports & other funder reports.
- Construction oversight/inspections, including Davis Bacon, Section 3, MBE/WBE reporting, including write-ups, construction cost estimates, and project management.
- o Identify & respond to potential conflicts of interests/community concerns, as requested.
- Attendance at monitoring, site visits, County Commission, and community meetings; and preparation of responses to any public requests or concerns.
- o Monitor & provide tech assistance through selection of partners, developers, & engineers.



### Financial Responsibility

We understand the most critical aspect of successfully implementing a grant-funded program is ALWAYS being able to follow the money! Guardian professionals have worked throughout the state of Florida, on hundreds of publicly funded projects using every major federal and state funding source, including, CDBG, USDA, FDEP, EDA, TIF, CHWIP, SRF, 108 loans, NSP, HOME, SHIP, FEMA Disaster Prevention (mitigation, preparedness, and recovery), Water Management District funding and private funds.

Of equal importance is Guardian's unique team expertise in **layering multiple funding sources**, which include, but are not limited to: Economic Development Administration Grants, USDA Rural Development Grants and Low-Interest Loans, Department of Environmental Protection Grants and Low-Interest Loans, and other applicable grant and low-interest loan funds through the Federal, State, or other public sources, which may be applicable to County's project(s). These various resources decrease the cost of programs to the local community.



### Location and On-Site Capability

At Guardian, we feel providing the **maximum accessibility** and **on-site capability** is critical to the successful management and completion of a project. Because our team members live locally to our clients and work remotely, they often work outside normal office hours and make every effort to respond to your calls or requests within 24 hours. Allowing our team to be completely mobile means we can go where the project needs attention, as well as interface regularly with the client.



### **Experience with HUD and other federal and state Agencies.**

We have worked with every Federal, especially HUD, and State funded sources and know their criteria to match your community and infrastructure needs. We have monitored and overseen dozens of sub-recipients as part of our CDBG, EDA, USDA, TIF, SRF, OTTED, NSP, HOME, SHIP, FEMA Disaster, private leverage and multiple other grant and loan-funded project management, including rate negotiations.



Corbett Alday, COO, has extensive HUD experience and training on completing environmental reviews. Our Team has received praise from State agencies on the completeness and accuracy of the environmental reviews we have prepared.

- We develop Tier Two Checklists, FONSI notices, and Floodplain Management Plans.
- We draft notices, letters, and sample maps ready for your review and submittal to the funding agencies.
- Complete statutory checklist and respond to any comments.

Our team has extensive experience with funding-agency contracts and managing and tracking all manner of grants and loan-funded project dollars.

For every project, the Guardian team:

- Sets up a duplicate comprehensive program budget and regularly reconciles our numbers with yours.
- Sets up uniform checklists and forms for vendors, stakeholders, and Section 3 and MBE participants.
- Reviews all pay requests and change orders for accuracy and appropriateness.
- Drafts all Federal, State, or private funding and reporting agency reports for staff review.
- Sets up your filing system and regularly self-monitors it for completeness.

• T.A. with and understand the reporting requirements imposed by Federal and State agencies and in turn the requirements they impose on local governments.

Equally important in ensuring that the County is in the best position to successfully apply and qualify for future grants:

- We meet with your County Staff, elected officials, department directors and other stakeholders to discuss immediate concerns and priorities.
- We research potential Federal, State, and private leverage resources and provide recommendations for potential financial match and their requirements, allowing you to evaluate match opportunities.
- We develop all manner of policies and procedures related to implementation of grant and loanfunded programs, including all processes, grant policy, procedure guidelines, W/MBE, Section 3, URA guidelines, and many more.
- We develop public notices, RFPs, agreements, policies, and other grant-related documents.
- We will develop a step-by-step Task Plan that allows us to work in partnership with your staff and maximize your resources and partners.
- We represent you at public and Commission meetings when needed or requested.
- We utilize existing relationships with vendors, contractors, lenders, title search companies, realtors and many others serving your area.
- We provide a one-stop toll-free number dedicated to our clients and businesses.
- We work with myriad Federal and State funding sources to create and administer grant, developer, subrecipient and construction agreements.
- We cover every facet of grant and loan-funded applications, administration and implementation with checklist and trading.
- We provide draft forms and field experience to document all funding requirements, from environmental review to intake to construction to closeout.
- We provide successful strategies for meeting milestones and objectives.
- We draft bid grant specs and guide advertising for and vetting contractors and vendors in the best interest of our communities.
- We provide contract requirement guidelines established for pre-construction meetings and will provide technical training for the contractor(s) and their subs.
- We provide the Project Engineer and/or Architect with an electronic version of a standard document guide, supplemental conditions for specific grant & include the Wage Decision(s) for the project, as applicable.
- We develop quality inspection records and progress reports for immediate review.



# **KEY TEAM MEMBERS PERFORMING WORK UNDER AWARD**



The Guardian team brings to the Hernando County extensive experience in the planning, application, program administration, and compliance of Federal and State funded grant and loan-funded programs, including SHIP. When you engage the Guardian team, we commit to being on site with you as often as is required. We understand the importance of face-to-face time, and we take it very seriously. Key industry professionals own and manage the business as well as serve your projects directly.

your projects directly.  hristine Alday resident/CEO Will provide overall project financial tracking & review, oversight, and controls for funding, & contract review.		<ul> <li>Over 21 years of audit, accounting, &amp; fiscal management.</li> <li>15 yrs. grants consulting, program administration.</li> </ul>
Corbett Alday Vice President/COO	Will provide experience in environmental review, research, grant application, implementation & management of federal & state prog.	<ul> <li>27+ years of grants consulting and program admin/experience.</li> <li>130+ projects, and Economic Development of 2,500 jobs.</li> <li>Creative layering expertise</li> <li>Engineering background</li> <li>ENVRR Specialist</li> </ul>
Don Ridley Licensed Building Inspector Director of Construction Administration	Will provide technical assistance in relation to all construction development programs.	<ul> <li>36+ years of construction exper. with 7 major disaster events.</li> <li>100+ infrastructure jobs</li> <li>2,500+ housing units</li> </ul>
Antonio Jenkins Project Manager/Housing Specialist	Will provide inspections, work-write-ups, bid documents, NTB, and NTP. Create/track project constr. budget, monitor, approves construction/contractor pay.	<ul> <li>14+ years of extensive operations/project experience.</li> <li>1,000+ housing units</li> <li>Well versed in building standards</li> <li>Oversees CDBG/SHIP/NSP rehab/new construction projects.</li> </ul>
Jean Rags Project Coordinator	Will provide review of grant application. Local polices/procedures and funder requirements.	<ul> <li>21+ years of government and federal and state grants.</li> <li>Implement/manage CDBG housing projects in local govt.</li> </ul>
Gayle Brett-Sub Consultant Real Estate Transaction Specialist and Grants Administrator	Will provide grant research & prep, state government expertise & insight, review grant docs. Property review & acquisition exper.	<ul> <li>26+yrs working for FDEO &amp; FDEP.</li> <li>Years of experience in buying, selling/managing real estate transactions for the State, counties, cities &amp; private sector.</li> </ul>
Marina Edwards Program Manager	Will maintain records, notices, meeting materials, conduct on-site file maint. Prepares/processes environmental reviews.	<ul> <li>7 years direct grant experience</li> <li>Years of non-profit work in housing rehabilitation and new build experience.</li> </ul>
Dawn Cobb Grants Administrator	Assist applicants and tracks all forms of verification. Reviews budgets and financial plans for accuracy and appropriateness.	<ul> <li>18 years experience with local government recipients</li> <li>9 years experience as a Housing Program Coordinator</li> </ul>
Eliana Alday Grants Assistant	Applicant appointment scheduling, maintains company server and client files	Intern training on SHIP/CDBG compliance and administration



The Guardian Team has been successful in maintaining numerous repeat clients, continuing to bid competitively, and keeping client satisfaction and quality service at the forefront of our practice. Guardian's projected workload for the next 24 – 36 months consists of 12-14 clients and 15-17 grant projects, not including any programs we might administer on behalf of your community. The Guardian Team will dedicate ample resources to your projects, including acquiring additional office space and staff as needed.

The following presents a summary workload for the Guardian team:

City of Avon Pork CDPC Haveing Dehabilitation	000/ complete
City of Avon Park CDBG Housing Rehabilitation	90% complete
City of Avon Park CDBG Mitigation Fire Station	New
City of Avon Park CDBG Mitigation Water System	New F00/ complete
Citrus County DRI CDBG Housing Demo/Replace	50% complete
Citrus County CDBG Economic Development	10% complete
Columbia County CDBG Economic D Truck Stop	10% complete
Columbia County CDBG DRI Paving and Drainage	New
Columbia County CDBG DRI Road/Paving/Drainage	New
Columbia County CDBG Housing Rehabilitation	New
Desoto County CDBG Environmental Review	100% complete
Hendry County CDBG Housing Rehabilitation	100% complete
Hendry County SHIP Housing	Ongoing by Task Order
Hernando County CDBG Housing Rehabilitation	100% complete
Indian River County CDBG Housing Rehabilitation	90% complete
Indian River County SHIP Housing	Ongoing by Task Order
City of LaBelle CDBG Neighborhood Revitalization	100% complete
Town of Lake Placid Rural Infrastructure Fund	New
Town of Lake Placid Legislative Project	New
Town of Lake Placid State Revolving Fund	New
Town of Lake Placid CDBG Commercial Rev.	New
Martin County CDBG Housing Rehabilitation	100% complete
Martin County SHIP Housing	Ongoing by Task Order
Osceola County Environmental Review	10% complete work order
City of Palm Coast Entitlement Housing	2020-100% complete, 2021 99% complete 2022 - New
City of Palmetto CDBG Economic Development	10% complete
Putnam County SHIP Housing	Ongoing by Funding Year
City of Sebastian Entitlement CDBG	Ongoing by Funding Year
Sebring Airport FEMA Technical Assistance	Ongoing
Spring Lake Improvement District Sewer Mains	90% complete
Spring Lake Improvements District Water Plants	New
City of Stuart CDBG Housing Application	New
Taylor County CDBG Housing Application	New
City of New Port Richey CDBG Housing Application	New
Columbia County ARPA Emergency Assistance	New
City of St. Augustine CDBG-CV	New
City of Stuart CDBG-CV	New
City of Lake Worth Beach CDBG-MIT	New
Lee County Entitlement CDBG	New
200 County Lindianie Cobo	111411



### Christine Alday, President and CEO

Ms. Alday is the owner and President of Guardian Community Resource Management, Inc. She has been working with grants and loan-funded programs since 2005. Her prior experience was working for a private Fortune 500 company as an Accountant and Auditor. Christine has "hands on" financial management experience with federal, state, local and private funding sources. Christine Alday has extensive experience with funding-agency contracts and managing and tracking all manner of grants and loan-funded project dollars and is responsible for the overall financial management of each project.

### Education/Certificates

Masters - Accountancy, Univ. of S. Florida BA, Accounting, Univ. of S. Florida

#### **Professional Assoc.**

President, West Central Florida Chapter, Grant Prof. Association Woman of the Year 2012-2013 by National Assoc. of Prof. Women Fl. League of Cities Fl. Assoc. of Counties Fl. Comm. Dev. Assoc. Fl. Green Bldg. Coalition Amer. Women's Bus. Assoc. Lakeland Chapter

#### Training

NSP, CDBG, SHIP, HOME, USDA, HUD and FDEO Wrkshp/Webinars OIG fraud training CDBG Rule Hearings, Appl. & Imple. Wrkshops Florida in the Sunshine and Ethics Seminar

#### **CDBG Projects**

Lake Placid, City of Labelle, City of Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties, Spring Lake Imprv.Dist.

### Professional highlights and duties:

Ms. Alday develops financial tracking for all grants and loan-funded federal and state projects and ensures accurate financial management. She has over twenty-one (21) years of audit, accounting, and financial management experience, and over fifteen (15) years of grants consulting and program administration experience. She is responsible for contract management, monitoring preparation and managing client relations. She has worked on housing and infrastructure projects totaling more than \$200,000,000 in funding from myriad sources.

- Creates a duplicate project budget and reconciles it regularly with the local government and the funding agency.
- Reviews budgets and financial plans for accuracy and appropriateness.
- Coordinates with client auditors on financial questions related to the grants.
- Conducts a review of all grant close-out packages and provides a balance of project budgets prior to closeout.
- Reviews client procedures/policies as needed, including substantive tests of internal controls, & evaluate internal methodology.



### J. Corbett Alday, Vice President/COO

Mr. Alday's career in public funded projects began over twenty-seven (27) years of grant experience, and over 130+ projects and economic development of 2,500 jobs. He is the lead Project Administrator for all our projects. During his career, he has continued his work with Small Cities CDBG, adding work experience in a vast array of public funding sources. These include: Special Appropriation Disaster Recovery CDBG, Entitlement, HMGP, SHIP, USDA, SRF, FDEP, FDOT, OTTED, EDA, EPA, SWFMD, SRWMD, STAG, Section 108 CDBG, FRDAP, FEMA, HUD, SBA, HHRP, FHFC, NSP, and many others.

#### **Education/Certificates**

Bachelor's Degree in Engineering, Fl. State Univ. AA in Drafting Technology

#### Professional Assoc.

Florida League of Cities Florida Assoc. of Counties Lake County League Cities Florida Comm. Development Association Florida Green Bldg. Coal. Grant Professionals Association

#### Training

NSP, CDBG, SHIP, HOME, USDA, HUD, FDEO Wrkshp & Webinar Green Bldg. Training Ser. HUD/ENVRR/RROF tr. Storm Water Utility Rate, Planning, Utility Develp. & Fin. Courses FEMA HMGP/FMGP TS CDBG Rule Hearings, Appl. & Impl Wkshops, CDBG Sect 108 Wkshop. Florida Sunshine/Ethics GIS for Comm. Dev Prof.

#### **CDBG Projects**

Lake Placid, City of Labelle, Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties, Spring Lake. Imprvmt. Dist. Gateway District, Sebring, Sebring Airport.

### Professional highlights and duties:

Mr. Alday is the leading expert in the State in the area of creative layering – the linking of multiple funding sources. For hundreds of projects, he has helped communities match sound technical solutions with the special restrictions of grant-loan programs.

Mr. Alday has experience working in over fifty (50) communities in excess of twenty (20) different sources of funding totaling more than \$500 million!

Mr. Alday has extensive project management experience from grant writing to implementation to close out. He has successfully implemented HUD's Environmental Review Record (ENVRR) requirements on numerous projects.

- Conducts grant-loan funding research and performs site investigations & preliminary scoring to determine community needs and grant funding feasibility.
- Conducts needs analysis, grant research and prepares draft application writing.
- Develops layering recommendations and preliminary applications activities.
- Participates in and oversees bid and construction management, Davis Bacon and manages the environmental review processes consistent with NEPA requirements.
- Serves as Project Manager on this RFP.



### Donald M. Ridley, Construction Manager/Technical Support

Mr. Ridley brings over thirty-six (36) years of grant experience and 2,500 housing units completed including construction oversight experience to our team of seven (7) declared disaster events. Mr. Ridley is experienced in FEMA disaster recovery programs, including all forms, policies and procedures related to disaster events i.e. Public Assistance worksheets and HMGP. He is a recognized construction professional in Florida with a wide range of relevant experience: site development, housing, utilities, water and sewer plants, power plants, earthwork, foundations, concrete, masonry, steel, welding, painting and roadway construction. Don provides technical assistance to all construction development projects.

#### **Education/Certificates**

Business Education from Jones Business College State Licensed Standard Inspector, BN-0001431 Certified SBCCI Housing Rehabilitation Certified SBCCI Bldg. ACI, NICET, FI DBPR Lic ICC and BOCAI Inspector

#### **Professional Assoc.**

Florida League of Cities Florida Assoc. of Counties Lake County Lg. of Cities FL Comm. Develp. Assoc. Osceola Grants Res. Network International Code Council

#### **Training**

FDEO NSP TA Training
HUD ENVRR & RROF Tr.
US HUD Envrr. Review Proc.
My Safe Fl. Home Inspector
FL Bldg. Code Advanced Building Structural Summary
Inter Codes 2: Occp & Loads
FL Building Code Advd.
Resid-Floors, Walls/Roofs
FL Building Code Advd. -IEQ
ADA Guidelines: Access. Rt.

CDBG Projects
All open projects

### Professional highlights and duties:

Mr. Ridley is well versed in permit and grants regulatory issues and understands the special restrictions of public grant-loan funded projects. Mr. Ridley is highly experienced in construction plans review, time management and cost control.

In addition, Mr. Ridley has worked with more than one-third of the Florida counties and municipalities as well as many leading engineering and construction firms. He has extensive experience with post-disaster redevelopment issues and has managed and inspected development projects for streets, downtown, water and sewer works totaling over \$300,000,000.

- Participates in site inspections & investigations, field verification of quantities and adherence to project specifications.
- Participates in on-site compliance monitoring, for regulations related to Davis Bacon, Section 3, Copeland "Anti-kickback" Act, W/MBE and others.
- Participates in project development and implementation; oversight in bid and construction management, and review of environmental issues.



### Antonio Jenkins, Specialist Project/Construction Manager

Mr. Jenkins has over fourteen (14) years of extensive operations and project coordination experience in over 1,000 housing units and is well versed in the latest building standards and codes. Antonio manages the construction administration and project representation for our land development and housing programs, including CDBG, NSP, SHIP, HOME, and others. Additionally, Mr. Jenkins has an extensive background in social and operations management which enables him to provide excellent client customer service and serves as an invaluable asset in the-field and when face-to-face time is required with clients.

#### **Education/Certificates**

Bachelor's Degree in Political Science, Valdosta State University Certified Inspector My Safe Florida Home Florida Green Home Designation Certification

#### **Professional Assoc.**

Florida League of Cities Florida Assoc. of Counties Lake County Lg. of Cities FL Comm. Develop. Assoc. Fl. Green Bldg. Coalition

#### **Training**

NSP / CDBG / SHIP / HOME / USDA / HUD / FDEO Workshops and Webinars Lake & Volusia County 2011 Annual Green Symposium **HUD Section 3 training** Issues/Challenges of Owner-Occupied Rehab FDEO NSP TA Training HUD ENVRR & RROF Tr. Green Building Tr. Series CDBG Rule Hearings, Appl / Impl. Wkshops U.S. HUD Envrr. Review My Safe FL Home Inspector

#### **CDBG Projects**

Lake Placid, City of Labelle, City of Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties,

### Professional highlights and duties:

Mr. Jenkins' primary duties include project delivery services and construction oversight, including single family homeownership and multi-family homeownership & rental for NSP and for CDBG implementation, in addition to oversight of construction bidding, contractor vetting and program management.

Mr. Jenkins continues to oversee the construction and / or rehabilitation of 1,000+ multi and single-family housing units and the construction oversight of various other grant funded infrastructure projects.

- Conducts orientation sessions for contractors and vendors.
- Conducts site inspections for compliance.
- Reviews/recommends changes to local HAP.
- Conducts HUD Tier 2 Environmental Reviews.
- Reviews mortgage & construction contracts.
- Conducts monitoring of single/ multi-family rental construction.
- Conducts & provides inspections, work-write-ups, bid documents, NTB, and NTP.
- Creates/tracks project construction budget; reviews, monitors, approves construction and contractor pay authorizations.



### Jean Rags, Project Coordinator/Technical Advisor

Ms. Rags has over twenty-three (23) years of government and grants experience. Ms. Rags successfully implemented and managed in excess of \$15 million dollars through Community Development Block Grant (CDBG) projects for seven (7) Housing Rehabilitation and Economic Development projects and the application and implementation of the Neighborhood Stabilization (NSP1 and NSP3) Grant Programs in Hernando County from 1999-2012. Jean conducts grant research and funding resource analysis, drafts local policies and procedures for our clients to meet funder requirements, and reviews / edits contracts and grant related advertisements, memos and documents. Jean also provides marketing and proposal responses on behalf of Guardian.

#### **Education/Certificates**

Bachelor of Arts, Major in Human Services, Minor in Social Services, St. Leo College Associate of Arts, Pasco-Hernando State College NIMS Series ICS100B, ICS200B, ICS007A Certifications

#### Professional Assoc. Notary Public, State of FL

#### Training

NSP3 HUD Workshop FDEO
NSP1 TA Training FDEO
E-CDBG training
NSP Implemt. Workshop
CDBG Rule Hearings,
Application/ Implementation
Workshops
FDEO DRGR Webinar Tr.
NSP Workshops/Webinars
FHC Annual Statewide
Affordable Housing
Conference

#### **Projects**

All open and potentially new projects.

## Professional highlights and duties:

Prior to joining Guardian in 2012, Ms. Rags was the Director for Community Development in Hernando County, where she was responsible for the oversight and management of numerous County departments in addition to CDBG & NSP programs totally \$15 million.

- Reviews & edits all contracts, policies, amendments & grant documents, prior to submission.
- Markets and develops proposals in response to open RFP, RFQ, and RFI's.
- Participates with attendance and representation as needed at client offices, public meetings.
- Provides development and review of grant management policies and procedures.
- Develops grant required documents, (e.g. Housing Assist. Plans, policies & procedures.
- Assist in monthly client billing review, calculations and invoicing as needed.



### Gayle Brett, Sub-Consultant / Program Specialist

Ms. Brett has 20+ years of government, grants and real estate experience working in both the private sector and also for the State of Florida in various state and federal programs. Previously, she worked for Fl. Depart. of Economic Opportunity (FDEO) Housing and Community Development Section with the NSP & CDBG programs and also in Florida Communities Trust (FCT), a land buying program that received \$66 million per year to assist cities and counties in purchasing property, negotiating, contracting/ closing as needed. Ms. Brett has eight (8) years of employment in private sector real estate, and previously held both a Real Estate Sales Associate and Broker license. Ms. Brett is responsible for providing program administration for NSP1, NSP3, CDBG & SHIP programs in Osceola, Martin, Flagler, Putnam, Hernando counties and others.

#### **Education/Certificates**

Davis Productivity Award as part of the team that implemented State of Florida's NSP 1 award

#### Professional Assoc.

Florida Real Estate Sales License Tallahassee Board of Realtors ® Natl. Assoc. of Realtors ®

#### **Training**

SHIP Prog. Admin. Webinar **HUD Prog Income & NSP** Admin. Strategies HUD NSP Closeout Webinar Annual CDBG Tr. Workshop NSP 3 Appl/ Impl. Workshop HUD Tr. Web-NSP1 & 3 HUD Fair Housing Training National Right-of-Way Assoc: Leadership Skills for Real Property Prof Intro.to Prop. Mgmt., Real Prop. Asset Mgmt./Surv Fl. Real Estate Assoc. & Broker Licensing (not lic.) FDEO e-CDBG Webinar HUD **DRGR Stand Reports** Webinar Conference

#### **CDBG Projects**

City Palm Coast; Indian River, Martin, Osceola County

### Professional highlights and duties:

Prior to joining Guardian in 2012, Ms. Brett worked with FDEO's Housing and Community Development department in the oversight and implementation of the state's NSP Program.

She also worked with the FDEP; Division of State Lands, in the Conservation and Recreation Lands Program, Preservation 2000 and Florida Forever Programs.

Ms. Brett's career has been built on good communication skills and bringing her real estate expertise into streamlining the state government land buying, selling and management practices.

- Reviews and edits all real estate contracts, appraisals, title insurance commitments, policies, closing statements, documents and mortgages.
- Communicates with real estate agents, brokers, banks and appraisers to better assist our clients in maintaining grant compliance.
- Attends public meetings/hearings and conducts grant compliance monitoring.
- Develops grant required documents.
- Reviews/edits drafts of required agency reports: MSR, MBE, Section 3, quarterly status reports and other grant related reports.
- Research, preparation and processing of SHIP payoffs and Satisfactions



### Marina Edwards, Program Manager

Ms. Edwards' experience with applicants for non-profit programs has been invaluable as she coordinates all of Guardian's Applicant intake for local government recipients. She has been working withgrants since 2016. Her prior experience was working for non-profit organizations as Development Director and Community Relations Director. Marina has experience with federal and state, grant regulations and requirements and remains current with all new CDBG and SHIP housing trainings and webinars. She has advance technology skills and is proficient with all Microsoft software and other related system programs and applications, server maintenance, and all office related technologies.

#### **Education/Certificates**

Minster College – United Kingdom – BTEC City and Guilds diploma in Art & Design

#### Professional Assoc.

National Notary Association

#### **Training**

Habitat for Humanity Mortgage and Homeownership Training

#### **CCTCP Training**

Various grant writing workshops

HUD Environmental Review Procedures

SHIP Intake/Report Training

### CDBG/SHIP Projects

Putnam County SHIP Hendry County SHIP/CDBG Martin County SHIP/CDBG Citrus County CDBG City of Avon Park CDBG City of Sebastian CDBG Osceola County CDBG Columbia County CDBG/ARPA City of New Port Richey CDBG Taylor County CDBG City of Stuart CDBG Town of Lake Placid CDBG **Desoto County CDBG** Indian River County CDBG/SHIP City of St. Cloud CDBG City of St. Augustine CDBG City of Lake Worth Beach CDBG

### Professional highlights and duties:

Ms. Edwards is responsible for the review, vet, creation, and management of all client related files including contractors, subcontractors, homeowners, homebuyers, renters. She is responsible for the maintaining of records, preparing public notices, materials for meetings, and conducts on-site file maintenance, prepares and processes environmental reviews.

She provides support and assistance to all team members daily and assists in the management of administrative project requirements to maintain efficient records/reports and timely responses.

- Assists with tracking project statistics and applicant demographic information.
- Oversees the review of individual/household applications to determine eligibility.
- Reviews clients grant administrative files to ensure those files are complete and audit ready.
- Assists with all grant reporting, based on applicable grant requirements, including Fair Housing, Civil Rights, MBE & Section 3.
- Prepares and processes environmental review records and coordinates with agencies and Tribes for consultations
- Prepares documentation for Request for Release of Funds on behalf of clients
- Prepares documentation for modifications to subrecipient award agreements on behalf of clients



### Dawn Cobb, Grant Administrator

Ms. Cobb's experience with applicants has been invaluable as she coordinates all of Guardian's Applicant intake for local government recipients. Her prior eighteen (18) years experience was with a local government municipality and the last nine (9) years as their Housing Program Coordinator which overseen all of their housing programs (SHIP, CDBG,NSP and HOME).

### Professional highlights and duties:

Ms. Cobb is responsible for all Guardian grant recipients' Applicant screenings, third party verifications and updates for all digital and hard copy applicant files. She ensures that all relevant documentation is acquired from the applicant as per the program requirements.

- Assists applicants with required application and documentation queries.
- Tracks applicant information ensuring all relevant documentation is acquired, and information remains current as per the program requirements.
- Verifies licenses, company status and references for all contractors.
- Compiles and verifies environmental impact reports and studies.
- Reviews budgets and financial plans for accuracy and appropriateness.
- Coordinates with client auditors on financial questions related Conducts a review of all grant close-out packages and provides a balance of project budgets prior to closeout.
- Reviews client procedures/policies as needed, including substantive tests of internal controls, & evaluate internal methodology.

### Eliana Alday, Grants Assistant

Ms. Alday is our most recent Guardian Team member. She is invaluable in scheduling applicant appointments, maintaining our company server and maintaining applicant files to ensure they are audit ready.

# Professional highlights and duties:

Ms. Alday is responsible for all Guardian



Client:

Hernando County Board of County Commissioners

15470 Flight Path Drive Brooksville, FL 34604

(352) 754-4000

Contact:

Hernando County Health & Human Services

Veda Ramirez - Manager

621 Jefferson Street Brooksville, FL 34601

(352) 540-4338

vramirez@co.hernando.fl.us

Projects:

**CDBG-Housing Rehabilitation FY2015** 

Housing rehabilitation of 11 units

Awarded June 2017 - Completed June 2021

Project was completed within budget. Due to COVID

impacting the availability of construction materials, a time

extension was requested to complete the projects.



Client: Martin County Board of County Commissioners

435 Southeast Flagler Avenue

Stuart, FL 34996 (772) 419-6932

Contact: Martin County Human Services

Michelle Miller - Human Services Administrator

435 Southeast Flagler Avenue

Stuart, FL 34996 (772) 288-5735

mmiller@martin.fl.us

Projects: CDBG-Housing Rehabilitation FY2017

Housing rehabilitation of 11 units

Awarded September 2017 – completed April 2022

Project was completed within budget. Due to COVID

impacting the availability of construction materials, a time

extension was requested to complete the projects.



Client:

City of Avon Park

110 E Main Street

Avon Park, FL 33825

(863) 452-4400

Contact:

City of Avon Park Finance Department

Melody Sauerhafer – Finance Director

110 E Main Street

Avon Park, FL 33825

(863) 452-4410

msauerhafer@avonpark.city

Projects:

**CDBG-Housing Rehabilitation FY2017** 

Housing rehabilitation of 11 units

Awarded December 2018 – anticipated completion

December 2023

Project is within budget. Due to COVID impacting the

availability of construction materials, a time extension was

requested to complete the projects.



Client:

**Indian River Board of County Commissioners** 

1801 27th Street

Vero Beach, FL 32960

(772) 567-8000

Contact:

**Indian River Planning Department** 

Chris Balter - Chief of Long Range Planning

1801 27th Street

Vero Beach, FL 32906

(772) 226-1250

cbalter@ircgov.com

Projects:

**CDBG-Housing Rehabilitation FY2017** 

Housing Rehabilitation of 11 units

Awarded December 2018 - anticipated completion January

2023

Project is within budget. Due to COVID impacting the availability of construction materials, a time extension was requested to complete the projects.



Client: Columbia County Board of County Commissioners 135 NE

Hernando Avenue Lake City, FL 32055 (386) 866-4100

Contact: Columbia County Administration

David Kraus - County Manager 135 NE

Hernando Avenue Lake City, FL 32055 (386) 758-1005

David kraus@columbiacountyfla.com

Projects: CDBG- Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client: City of New Port Richey

5919 Main Street

New Port Richey, FL 34652

(727) 853-1016

Contact: City of New Port Richey Planning

Lisa Algiere - Senior Planner

5919 Main Street

New Port Richey, FL 34652

(727-853-1050)

AlgiereL@CityofNewPortRichey.org

Projects: CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client:

Taylor County Board of County Commissioners

201 E. Green Street

Perry, FL 32347 (850) 838-3500

Contact:

**Taylor County Grants Department** 

Jami Evans - Grant Coordinator

401 Industrial Park Drive

Perry, FL 32347 (850) 838-3553

jevans@taylorcoutygov.com

Projects:

CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client: Citrus County Board of County Commissioners

110 N Apopka Avenue Inverness, FL 34450

(352) 341-6560

Contact: Citrus County Housing Services

Michelle Alford - Director

2804 W. Marc Knighton Court

Lecanto, FL 34461 (352) 527-7520

michelle.alford@citrusbocc.com

Projects: CDBG-DRI Housing Rehabilitation

Demolition and reconstruction of 3 homes

Awarded June 2019 – Anticipated completion September

2023

The budget for these projects was increased from \$1m to \$1.6m as these projects needed to be elevated to 2ft above the Base Flood Elevation (BFE) therefore requiring the projects to become demolition/reconstruction projects. Due to COVID impacting the availability of construction materials, a time extension was requested to complete the projects.



Client: City of Palm Coast

160 Lake Avenue

Palm Coast FL 32164

(386) 986-2360

Contact: City of Palm Coast Planning & Zoning

Jose Papa – Senior Planner

160 Lake Avenue

Palm Coast, FL 32164

(386) 986-2469

jpapa@palmcoastgov.com

Projects: CDBG Entitlement Housing Rehabilitation

Ongoing housing rehabilitation

Guardian has been contracted with the City of Palm Coast

Housing Rehabilitation project since 2013.



Client: City of Stuart

121 SW Flagler Avenue

Stuart, FL 34994 (772) 288-5300

Contact: City of Stuart-Community Redevelopment Agency (CRA)

Pinal Gandhi-Savdas - Director

121 SW Flagler Avenue

Stuart, FL 34994 (772) 283-2532

pgandhi@ci.stuart.fl.us

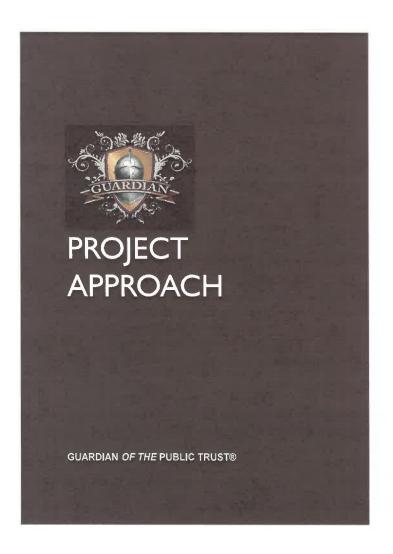
Projects: CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

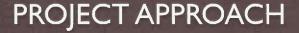
Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



- Our approach and success in grant writing, program administration and compliance are comprehensive, detailed, and follows a proven work plan centered on quality control. We measure our performance by the benchmarks we establish based on research, funding, administration, compliance requirements and construction timelines and funder requirements.
- Guardian does not anticipate using any sub consultants in this project.





- Preliminary Activities:
- Background research to identify project/program needs & networking with County Staff, elected officials, department directors to determine priority needs & formulate appropriate grant proposals and solutions.
- > Develop leveraging strategies for each potential funding source.
- Kick-off meeting with County Staff; review all requirements and meet with any businesses, organization partners, and other team members who may provide, GIS mapping, engineering documents, etc.
- Meet with local agencies and organizations that support the County's funding needs and priorities to determine potential collaborative or matching opportunities.
- > Prepare & attend all required Public Hearings, County Commission meetings, CATF meetings, and Fair Housing activities.
- > Review and/or develop new policies required for the grant submission process.
- > Develop grant proposals outlining potential leveraging and/or match opportunities.
- > Develop grant applications and provide ongoing technical support to staff.
- Prepare and submit final grant applications following County Commission approval.
- > Prepare for and provide representation and support during site visits.
- Prepare/provide representation and support during community outreach or orientation seminars



- Complete supporting documents for grant award contract documents.
- Complete grant agreement work plans and budgets.
- Develop required project record and filing system for all local/original documents.
- Establish a duplicate grant contract file system for tracking grant activity (electronic format preferred).
- > Establish a master schedule with benchmarks and timelines.
- Prepare all required public notices.
- Prepare required request for comments.
- Prepare any needed maps or supporting documentation.
- Policy and procedure review, including developer and/or non-profit agreements.

#### Post Award Activities:

- Prepare Environmental Review Records (ENVRR).
- Prepare FONSI advertisements and Request for Release of Funds (RROF).
- > Site/project specific inspections and ENVRR checklist as needed.
- Review/update/develop any required grant policies and procedures manuals.
- Review all grant agreements for compliance and special conditions.
- > Establish grant performance measures and benchmarks of performance.
- Develop program forms and checklist for intake qualifications, bidding and contracting.
- Provide a sample / review/ update RFP/RFQ for contractors and vendors.
- Recommend short list of vendors (e.g. construction contractors, surveyors, & other needed services).
- Vet all contractors and vendors.



# Outreach, Partner / Vendor Training & Support / Interface with County:

- Develop operating procedures & accompanying checklists, standardized reports for partners and vendors.
- Provide training, support, monitoring of day-to-day activity of partners, vendors.
- > Provide sample grant required forms, vetting forms, forms of agreement for contractors, partners, and vendors.
- > Write RFP scopes of work and provide 2 CFR 200 and State language.
- > Attend pre-bid and bid meetings for support.
- > Write technical assistance answers to bid questions, including Technical assistance to selection committees.
- > Develop scope and federal developer agreements.
- Quarterly zoom progress and strategy meetings.

#### Compliance Monitoring:

- > Oversee project schedule and compliance, including regular monitoring & updates.
- > Representation during monitoring/site visits, audits and community meetings.
- Coordination with other agencies, partners, recipients and contractors.
- Provide all other necessary technical assistance to staff and contractors.
- Prepare regular status reports, e.g. grant funding report, grant contract status, quality control activities & results, major accomplishments, success stories, etc., noteworthy meetings/accomplishments, work plan issues, budget and uses of funds.



- Updates to HUD 2880 disclosures, Section 3 and MBE/WBE performance reporting.
- Procedures for comprehensive identification of beneficiaries, if applicable.
- Create monitoring, documentation and reporting of the efforts and results.
- > Monitor all regular grant-funded project activity to ensure compliance.
- > Davis-Bacon compliance for relevant activities, e.g. review of related contractor payrolls, wage interviews, project photos, etc.
- > Request Wage Decisions where applicable and provide sub-grantee/contract guidance for specific activities.
- > Review construction contract documents and supporting information compliance.
- Review & ensure compliance with applicable laws, e.g., ADA/504 Handicap Accessibility, Uniform Relocation Act and Anti-Displacement, Copeland Anti-Kickback, Civil Rights, Fair Housing, all applicable parts of 24 CFR, and any other related federal requirements.
- > Oversight and coordination of citizen input and public meetings (coordination and response to citizen complaints/concerns).
- Develop, process and track amendments (action plans and other plans) where needed.
- Identify conflicts of interest and coordinate the issuance of a waiver if necessary.
- Fraud prevention and monitoring.
- Monitoring and prevention of duplication of benefits.





#### Project Delivery Services:

- Conduct initial site visits.
- Meet with the Building Department, Purchasing Department, & other involved departments to coordinate bidding, permitting & inspections as needed for specific activities.
- Advise on / assist with expediting permitting.
- Provide guidance on establishing & managing construction schedules.
- > Develop funder bid conditions for construction bid and review bid specifications prior to advertisement.
- Assist with finalizing the Scope of Work (construction bid).
- > Work with your staff to bid out, select & receive approval for contractors and bids.
- > Coordinate meetings with staff and contractors to review and sign construction contracts, related documents.
- > Attend & provide technical assistance during any pre-bid, pre-construction conferences, & progress meetings as needed on all projects.
- Review the Notice to Proceed for compliance so construction can begin.
- Provide quality assurance/grant compliance construction inspections. Work with Building Department to coordinate inspections & approval of draw requests.
- Review all pay applications and change orders before approval.
- Review final construction documents for completeness.
- Davis Bacon Compliance



# Financial Oversight:

- Assist with implementing an internal budget and setting up purchase orders, as needed.
- Review & advise on project financial management system for receiving/disbursing funds.
- Assist with financial reporting required by the funder.
- Assist with all Requests for Funds (RFF), working with County Finance Department.
- Review, advise, and establish layering plans for each program's eligible budget and activities to coordinate proper use and tracking of layered funds.
- > Review pay authorizations and change orders for compliance.
- > Review grants amendments for compliance.
- > Advise on maintenance of project account records.
- Provide sample time sheets for tracking of eligible grant-funded staff time.
- Assist with responding to external and internal audit questions.
- Monitor developer agreement activities for compliance.



### Project Closeout Activities:

- Balance final project budget.
- Gather all necessary completion supporting documents.
- > Prepare documents for administrative/financial close out of projects.
- > Research and prepare information/applications for new and continuing grants and their related funding cycles.
- > Document all warranties, release of liens, flood insurance, and related requirements.
- > Document all recordings of mortgage, note of deed restriction.
- > All closed agreements documented complete.





# REFERENCES & SUCCESS IN CDBG GRANT APPLICATION & PROGRAM ADMINISTRATION





The Guardian team understands that providing **good communication**, **maximum accessibility** and **on-site capability** is critical to the successful application, program management and completion of a project. Many of our team members live and work locally to our clients. They work outside normal office hours and make every effort to respond to your phone calls, emails, text and/or fax requests within one business day or sooner. Please see below a list of our client projects within the last five (5) years only, including contact information, services provided, performance period and total amount of contract.

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
		CDBG			
Hendry County	2015- 2016	CDBG-HR	\$750,000	Grant Writing Services, Grant/Loan Program Administrative Services. The Guardian	
Population 42,000		Miscellaneous Grant Services	\$20,000	team provided CDBG grant writing services and is currently providing program	
Sabrina M. Gadson Housing and Social	2017-	SHIP	\$700,000	administration services.	
Services (863) 675-5297	2018- ongoing	Section 8	4,00,000	The Guardian team is providing program management, project delivery services for a	
Sabrina.gadson@hendryfla.net	origoning	Housing	As needed	housing rehabilitation project and the SHIP Program. The Guardian team also provides construction management,	
		Inspections		contractor bidding and selection, constr. Inspection, Davis Bacon.	
City of Sebastian	2019 - ongoing	CDBG Entitlement	\$124,000 per year	Guardian is contracted to provide grant administration services.	- The same of the
Population 25,000		Littlement	\$120,000 + CV	Project to provide housing and sidewalk	
Lisa Leger Frazier, Director of Community			CDBG	improvements.	
Development (772)589-5518 Lfrazier@cityofsebastian.org					

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Indian River County Population 159,900	2014- 2017	CDBG-NR	\$750,000	CDBG NR projects were for new sewer lines/components and sewer hookups, and infrastructure for a County firehouse.	
John Stoll Chief – Long Range Planner	2011- 2013	CDBG-NR	\$750,000	The Guardian team provided grant writing, is currently providing program management & project delivery services. The Guardian team will also provide	
(772) 226-1243 istoll@ircgov.com	2017-	CDBG HR	\$750,000	construction management, contractor bidding and selection, constr. Inspection, Davis Bacon and program administration.	
	ongoing			Guardian provides ongoing initial inspections reports, detailed work writeups, cost estimates, and payment inspections.	
City of Avon Park	2011- 2013	CDBG-HR	\$750,000	The CDBG HR Projects provide housing rehabilitation and or replacement,	
Population 10,400	2017- current	CDBG-HR	\$750,000	improvements to owner-occupied LMI/VLI households. 2017 The Guardian team continues to provide grant writing,	THE PARTY OF
Mark Schrader City Manager mschrader@avonpark.city	2020-	CDBG- Mitigation CFHP	\$894,087	program management, project delivery services and financial layering expertise.	
	2020-	CDBG-MIT GIP	\$670,622	CDBG-Mitigation CFHP program will remodel and upgrade existing fire station.	
Hernando County  Population 193,900  Ms. Veda Ramirez, Health & Human	2010- 2012	CDBG-NR	\$750,000, layered with County & City funding, total project cost of approx. \$1M.	CDBG NR Project for new sewer/water lines, fire hydrants, & road restoration in LMI neighborhoods. The CDBG HR project provides for housing rehab for LMI & VLI homes.	1/2
Services Manager, (352) 540-4338 vramirez@hernandocounty.us	2015- 2016	CDBG HR	\$750,000, layered with County SHIP of \$50,000	The Guardian team continues to provide grant planning/application & program administration, contract prep & implementation, conducted household surveys, project inspections and financial management. Project management includes training, ENVRR, reporting and compliance monitoring throughout the program.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Citrus County	2010- 2012	CDBG-ED + leverage (Wal-	\$750,000 layered w/private	Project was for new water lines as part of the construction for job-creating business-	-
Population 149,600		Mart)	funding of over \$2M.	Wal-Mart Supercenter. CDBG -DRI project is for demo/replace/elevate LMI homes	Ahar
Sharon Watkins, Grant Administrator II (352) 527-5208	2015-15	CDBG-HR	\$750,000	damaged by hurricanes. CDBG-ED is for a Tech Recycling Plant. Guardian team provides grant application,	Low Prize
Sharon.watkins@citrusbocc.com	2018-	CDBG-ED	\$560,000	administration, & program oversight. Including contract preparation	
	2019	CDBG-DRI Infrastructure	\$1,000,000	implementation, conducting employee surveys, project inspections & financial management.	
City of Palm Coast	2013- current	CDBG Entitlement-	\$varies/year based on action	The City contracted with Guardian for assistance with developing and	
Population 85,900	current	Housing	plan allocation.	implementing their CDBG Entitlement program. TA with ENVR Reviews,	
Jose Papa, AICP Senior Planner		In progress		subordinations, etc.	
(386) 986-2469	2020-	Grant	2019 - \$20,000	The Guardian team prepared the City's on sight admin. files and continues to	
jpapa@palmcoastgov.com	current	Compliance Assistance	in fees	provide housing inspection and work write ups for rehabilitation, ranking of	Service Charles Marie 1
		Services		applicants, project oversight, develop entitlement files, forms, polices &	
				procedures for the administration of their CDBG program.	
Town of Lake Placid	2012- 2014	CDBG-NR	\$650,000	Project was for water treatment plant improvements and wastewater lift station	
Population 1,900				and needed road repaving. The second NR project was for building upgrades and	
Joe Barber	2017-	CDBG-NR	\$650,000	modifications, generators, and construction	
Town Engineer/Utility Director	2018	FEMA Pre Disaster	\$500,000	of waste-water treatment plant. FEMA funds were used for generators. The Guardian	E 17 10 10 10 10 10 10 10 10 10 10 10 10 10
(863) 699-3747	2017	CDBG-CR*	\$700,000	team members provided funding research, grant writing, financial leveraging, and program	
<u></u>	2019	CDDG CIK	4,00,000	administration, including contract prep/implementation, project	
				oversight, and financial management for the grant on all projects.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Osceola County Population 375,700	2009- 2011	CDBG-HR, SHIP	\$1,000,000 layered through SHIP and CDBG funds	Program addressed LMI/VLI homeowner rehab housing units. The Guardian team provided grant writing, program management, housing rehabilitation	
Danicka Ransom Housing Manager (407) 742-8400 dransom@osceola.org	2019-	CDBG/HOME	Task order	delivery services and financial layering expertise. Guardian continues to ongoing provide general services and tech support/environmental reviews	25 N
Columbia County	ongoing 2016-	CDBG-NR	\$750,000	NR Project was for the installation of water	
Population 71,600	2017- 2018	CDBG-ED 17	\$1,000,000	lines to connect to the city water system and road pavement.	
David Kraus County Manager	2018	CDBG -ED 18	\$1,500,000	Guardian performed grant administrative services, environmental reviews, project oversight & financial	
(386)623-6320 135 NE Hernando	2019-	CDBG-DRI	\$4,762,257	<b>mgmt. for the grants.</b> CDBG-ED project is expansion of County wastewater treatment	
Avenue, Suite 203 Lake City, FL 32055	2019-	CDBG-DRI CDBG-HR	\$3,614,118 \$750,000	plant. A second CDBG ED is for sewer and water mains to a shopping center. <b>Two DRI projects are for road flooding.</b> New	
David Kraus@columbiac ountyfla.com	2019	CDBG-HK	\$750,000	CDBG is for housing rehabilitation.	
Desoto County Population 38,000	2018 - ongoing	Grant Admin/Enviro. Review	Task Order per ENVR task	Project is for housing rehabilitation of LMI/VLI homes.  The Guardian team has been	
Lauri Benson Social Services Director (863)993-4858 I.benson@desotobocc.com				contracted to provide partial grant administration services, including document review and environmental review services for eleven (11) homes.	
City of Palmetto	2019	CDBG-ED	\$1,500,000	City is partnering with a hotel business to provide water, sewer, street	
Population 13,600  Jim Freeman	2019-	SRF	\$8,000,000	improvement and stormwater. The SRF funds will provide wastewater treatment plant upgrades.	THE STATE OF THE S
City Clerk (941)723-45470 ifreeman@palmettofl.org	current			The Guardian team is providing grant/loan writing & research, grant-loan admin., program management, technical support, and financial layering expertise.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
City of Stuart  Population 16,100  Pinal Gandhi-Savdas CRA Administrator 772-283-2532 pgandhi@ci.stuart.fl.us	2019-	CDBG-HR	\$750,000	The Guardian team has been contracted to provide Public Grant and Loan Funding Sources for Capital Facilities Planning, Program Administration, and Project Delivery Services for projects in CDBG regular category.	
Taylor County  Population 21,800 Melody Cox 201 E. Green Street Perry, FL 32347 (850) 371-0377 melody.cox@taylorcountygov.com	2019-	CDBG-HR	\$750,000	The Guardian team has been contracted to provide program administrative services for grant/loan funded projects for community and economic development, and Project Delivery Services for projects in CDBG regular category.	THE TOTAL OF THE
City of Port Orange Population 62,700  Joseph Castro Buyer City of Port Orange Finance Department 1000 City Center Circle Port Orange, FL 32129  386 506-5717	2020 -	HUD/CDBG Technical Assistance	\$70,000 PO and task orders	The Guardian team provides Technical assistance to create programs utilizing U.S. Department of Housing and Urban Development CDBG and Community Development Block Grant-CV funds. Assistance to include developing policies and procedures, application, checklist and continued technical assistance to answer questions and review items for compliance per CA7308.	1867 44 ORIDA

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
		SHIP / CDBG			
Martin County  Population 161,000  Michelle Miller Housing Program (772) 228-5456 mmiller@martin.fl.us	2011- 2012 2012- 2013 2013- 2014 2017- open	SHIP CDBG HR  In progress, currently contracted to administer all housing and CDBG programs	\$750,000 NR \$750,000 HR \$750,000 HR	Guardian was contracted for the overall management/compliance of the County's CDBG programs including SHIP. NR was for new sewer mains. HR was for housing rehab. Our responsibilities include: applicant intake, budget tracking, reports to FHIC & BOCC, inspections, SOW, bids, AHAC & public meetings, update LHAP, constr. Rehab, training, pay request approvals & response to client/homeowner.	Golden Gaft  Story Pacevalopment
Indian River County  Population 159,900  John Stoll Chief, Long-Range Planning Phone: (772) 226-1250 Fax: (772) 226-1922 srohani@ircgov.com	2014 – ongoing	SHIP Housing Program Inspection Services	SHIP awards have been varied	Guardian team provides initial inspections to inspect all major systems of identified units including; before digital pictures & provide those pictures to County with initial inspection report, prepare detailed work write-up, cost estimate, and submit the work write-up and cost estimate to staff, conducts pre-bid walk-thru for rehabilitation contractors interested in bidding on the project, reviews bids submitted for the project and provides comments to staff, reviews and approves any change orders submitted for the project, visits the job and prepares a punch list of unfinished items for all completed jobs.  Guardian also provides to the County documentation of notifications sent to Contractors and or Bidders, schedules and monitors all inspections in a timely manner and in accordance to contract and bid timelines. Completion of all inspection requirements conducted in accordance with HQS and Housing Plan requirements.	

Local Government	Fund Year	Type of Grants Other	Funded Amount	Scope	Project
Sebring Airport Authority  Mike Willingham Registered Agent 128 Authority Lane Sebring, FL 33870 863-314-1300 Mike@sebring- airport.com	2017- 2018 ongoing	FEMA Public Assistance	FEMA Irma	Guardian provides ongoing technical and compliance consulting with FEMA P.A. grants portal and mitigation.	
Gateway Community Development District  Chris Shoemaker District Manager (239)284-0350 Chris.shoemaker@gatewaydistrict.org	2017- 2019- current	State Revolving Fund (SRF)	\$3,000,000+	Project is on the third phase of storm pond erosion control.  Guardian is providing grant research/application services for new FDEP grant and SRF loan opportunities, in addition to other applicable federal, state and other loan application.	
City of Deltona  Jessica Entwistle Administrative Assistant jentwistle@deltonafla.gov 2345 Providence Blvd. Deltona, FL 32725 386-878-8100	2016- current	Open – Tech. Assistance	Work based on Task Orders	Guardian has been contracted to provide Davis Bacon and FDOT compliance monitoring.	Deltona Teltona
City of Port St. Lucie  Alessandra (Alex) Tasca Community Prog. Admin. Neighborhood Srv. Depart. (772) 871-7395 atasca@cityofpsl.com	2020-	Open- CDBG	Fees assessed by Tasks.	Guardian has just been awarded this contract to provide the City with CDBG Grant Administration to complete the City's 5-year Consolidated Plan.	PLORIDA CONTRACTOR

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
City of New Port Richey  Population 16,223  Debbie Manns City Manager (727) 853-1021  MannsD@CityofNewPortRichey.	2021-	CDBG-HR	\$750,000	Guardian has just been awarded this contract to provide the City with CDBG Grant Administration.	New Port Kichey Francist
City of Brooksville  Population 8,191  Charlene Kuhn Special Projects Coordinator (352) 754-4986 ckuhn@cityofbrooksville. us	2020-	CDBG	\$750,000	Guardian is providing Grant Writing and Grant Administration services for funding years 2020-2021.	Brooksville
Lake Placid Camp and Conference Center  Dr. Brian Wilson District Super Intendent (239) 561-1313 bwilson@sfnazarene.org	2020-	SRF- WW RIF Septic to Sewer	\$1,800,000 (80% Grant) \$570,000 \$600,000	Guardian is providing loan and grant application writing and program administration services for funded grants and loans.	JAKE PLACID Trapad (notificate Caper
City of St. Augustine  Population 14,581  Eric Walters Grants Administration Coordinator (904) 209-4302 ewalters@citystaug.com	2022-	SRF-DW CDBG-CV	\$1,600,000 \$1,251,299	Guardian is providing Grant Administration services for the St. Francis House Crisis Center Rehabilitation Project. Services include Environmental Review, grant compliance and reporting.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
City of Stuart  Population 16,100  Pinal Gandhi-Savdas  CRA Administrator  772-283-2532  pgandhi@ci.stuart.fl.us	2022-	CDBG-CV	\$4,791,000	Guardian is providing Grant Administration services for the small business incubator and job training program Project. Services include Environmental Review, grant compliance and reporting.	
City of Lake Worth Beach  Population 38,548  Julie Parham Assistant Director of Water Utilities (561) 586-1798 jparham@lakeworthbeachfl.gov	2020-	CDBG-MIT	\$989,262	Guardian is providing Grant Administration services for the storm hardening of the City's Water Treatment Plant Project. Services include Environmental Review, grant compliance and reporting.	



# **GUARDIAN** of the Public Trust®

Working for your community

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# TAB-1 Statement of Interest and Introduction/ Letter of Transmittal



July 28, 2023

Hernando County Board of County Commissioners Erin Kluis Briggs, Grant Writer 15470 Flight Path Drive Brooksville, FL 34604 (352) 754-4778 ebriggs@co.hernando.fl.us

Dear Ms. Briggs and Selection Commission Members:

Guardian Community Resource Management Inc. (Guardian) is a full-service grant management firm incorporated in the State of Florida since 2005 and continuing to serve local governments throughout the state. As an industry leader, we are here to help you meet the increasing needs for improved affordable local infrastructure, economic development, housing, disaster recovery, utility financing, and the creation of high wage jobs in your community.

Guardian has over 150 years of combined team experience, and is a leader in grant research, planning, writing/application, and program administration services for federal and state-initiated programs such as **Small Cities CDBG**, State Housing Initiative Partnership (SHIP), Economic Development, Public Works, and State Revolving Fund, among others. We believe our ongoing involvement in similar communities involving federal and state grant program administration, and our intimate familiarity with the complexities of Federal and State regulations, especially those under HUD, makes us the best qualified firm to fulfill your needs. We have worked in cities, counties, and special districts throughout Florida. In short, when you are talking about overall experience from application to implementation of state and federal grant funded programs, you will not find a more experienced knowledgeable, dedicated, and ethical team than Guardian.

In 2009, Guardian began working for Hernando County organizing and providing program administration and project delivery services for NSP1 funds to be used as financing mechanisms for REO property purchases, REO-LMMI direct purchase assistance, acquisition housing rehabilitation and VLI rental housing. Guardian moved forward with Hernando, providing services for another NSP project as well as various CDBG Housing and Neighborhood projects throughout the years. The Guardian team continues to provide grant planning/application & program administration, contract prep & implementation, conducted household surveys, project inspections and financial management.

Based on our record with federal and state government funded projects, please know that when it comes to working with the Hernando County team, we will always respond professionally, and in a timely manner. We will act in the best interest of your community, without overstepping our responsibilities. We will provide you and your residents with the highest quality standards and service that make Guardian a leader in this industry.

At Guardian, we feel providing the **maximum accessibility** and **on-site capability** is critical to the successful management and completion of a project. **Because our team members live locally to our clients and work remotely,** they often work outside normal office hours and make every effort to respond to your calls or requests within 24 hours. Allowing our team to be completely mobile means we can go where the project needs attention, as well as interface regularly with the client.

Our office is staffed with full-time office professionals that provide support for our clients and for our other team members. The office is equipped with all the major technological equipment, including scanners, copiers, computers, servers, and more. All Guardian team members are technically connected to serve our clients in the field with; Encrypted flash drives, available for client privacy/protection, and portable printers and access to Guardian's **backup servers** to ensure all documentation is secure and maintained in accordance with all public records requirements.

We have successfully written and completed over 200 projects, totaling \$500,000,000+ in grants, loans, and private investment (the mixing, matching, and leveraging of multiple funding sources), with the majority involving CDBG, SHIP, FEMA PA, SRF, NSP, HOME, Disaster Recovery, EDA, and other community and economic development programs.

The Guardian Team encourages you to contact our references and confirm that when you partner with our firm, you get a team that is responsive, technically knowledgeable and committed to your success. We are local, housed in Dade City, Florida, with exclusive experience with housing, neighborhood, commercial revitalization, economic development, and Florida disaster recovery.

It is our pleasure to offer our continued services to Hernando County. This proposal is a firm offer of services and is irrevocable for a period not to exceed one hundred and eighty (180) days from the public opening date and time. I am the duly authorized representative to negotiate and legally bind Guardian in a contract, and I understand and agree to be bound by the terms and conditions of the RFP and addendums as presented. I certify that no lobbying of any Selection Commission members or the Employees of the County has taken place and professional silence concerning the RFP has been maintained during the RFP process. Further, I declare that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to the RFP.

Please do not hesitate to contact me should you have any questions or require additional information. We look forward to the opportunity to serve you and your community.

Sincerely,

J. Corbett Alday
President & COO
15000 Citrus Country Drive, Suite 331
Dade City, FL 33523
352-437-3902
Corbett.alday@guardiancrm.com





# **Organization Profile and Capacity**

Guardian Community Resource Management Inc. (Guardian) is a full-service grant management firm established in 2005 as a for-profit, S Corporation, and is a State of Florida Certified Minority/Women Owned Business. The Guardian Team is comprised of nine (9) veteran grant and management professionals. Our Team brings to your organization over 150+ years of combined expertise and handson experience working in the various areas of state and federal grants and loan-funded community development and affordable housing.

Our office is located at 15000 Citrus Country Drive, Suite 331, Dade County, FL 33523. Our office phone number is 352-437-3902, Toll Free 888-482-7393.













Each professional team member assigned to your projects:

- Holds a post-secondary degree, certification, or professional license.
- Years of experience working in the public sector yielding unique insight into knowing the level of quality, customer service & performance expected from our clients.
- Is dedicated to the success of all our clients' projects.

## Ready to Proceed and Ready to Serve!

All Guardian team members are technically connected to serve our clients in the field with:

- Fully equipped laptops and wireless broadband internet access in addition to the full suite of Office products and other standard software,
- Encrypted flash drives available for client privacy and protection, a cellular phone, limited office supplies, and where needed portable printers.
- Access to Guardian's **backup servers** to ensure all documentation is maintained in accordance with all public records requirements.
- Toll free phone number accessible to not only Guardian clients but to all individuals, contractors and vendors that may be requesting assistance through the local governments and or agencies.

From its inception, the Guardian Team has worked **for local governments** to develop and provide grant research, planning, grant application preparation, leverage strategies, program administration and management and construction oversight services.

#### Our full-service grant management includes, but is not limited to:

- o Grant research, project planning, grant application writing, planning, & budgeting new prog.
- o Developing grant funding/leveraging strategies, including loans/layering of other funds.
- o Preparing HUD and NEPA Environmental Reviews (ERR) at all levels.
- Reviewing/updating various local grant related policies/procedures as required.
- Preparing Request for Funds, invoices, & approvals for expenditures.
- o Establishing necessary policy and procedures, best practice client and administration files.
- o Fiscal management of all funds, including match, leverage, change orders, pay requests.
- o Preparing RFP for procurement of contractors, engineers, vetting, bid invitations.
- Attending pre-bid conference, bid opening/pre-construction meeting, developing contracts.
- Assisting in/ preparing for required Fair Housing activities; preparing grant amendments, monthly, quarterly, close out reports & other funder reports.
- Construction oversight/inspections, including Davis Bacon, Section 3, MBE/WBE reporting, including write-ups, construction cost estimates, and project management.
- o Identify & respond to potential conflicts of interests/community concerns, as requested.
- Attendance at monitoring, site visits, County Commission, and community meetings; and preparation of responses to any public requests or concerns.
- o Monitor & provide tech assistance through selection of partners, developers, & engineers.



# Financial Responsibility

We understand the most critical aspect of successfully implementing a grant-funded program is ALWAYS being able to follow the money! Guardian professionals have worked throughout the state of Florida, on hundreds of publicly funded projects using every major federal and state funding source, including, CDBG, USDA, FDEP, EDA, TIF, CHWIP, SRF, 108 loans, NSP, HOME, SHIP, FEMA Disaster Prevention (mitigation, preparedness, and recovery), Water Management District funding and private funds.

Of equal importance is Guardian's unique team expertise in **layering multiple funding sources**, which include, but are not limited to: Economic Development Administration Grants, USDA Rural Development Grants and Low-Interest Loans, Department of Environmental Protection Grants and Low-Interest Loans, and other applicable grant and low-interest loan funds through the Federal, State, or other public sources, which may be applicable to County's project(s). These various resources decrease the cost of programs to the local community.



#### **Location and On-Site Capability**

At Guardian, we feel providing the **maximum accessibility** and **on-site capability** is critical to the successful management and completion of a project. Because our team members live locally to our clients and work remotely, they often work outside normal office hours and make every effort to respond to your calls or requests within 24 hours. Allowing our team to be completely mobile means we can go where the project needs attention, as well as interface regularly with the client.



### Experience with HUD and other federal and state Agencies.

We have worked with every Federal, especially HUD, and State funded sources and know their criteria to match your community and infrastructure needs. We have monitored and overseen dozens of sub-recipients as part of our CDBG, EDA, USDA, TIF, SRF, OTTED, NSP, HOME, SHIP, FEMA Disaster, private leverage and multiple other grant and loan-funded project management, including rate negotiations.



Corbett Alday, COO, has extensive HUD experience and training on completing environmental reviews. Our Team has received praise from State agencies on the completeness and accuracy of the environmental reviews we have prepared.

- We develop Tier Two Checklists, FONSI notices, and Floodplain Management Plans.
- We draft notices, letters, and sample maps ready for your review and submittal to the funding agencies.
- Complete statutory checklist and respond to any comments.

Our team has extensive experience with funding-agency contracts and managing and tracking all manner of grants and loan-funded project dollars.

For every project, the Guardian team:

- Sets up a duplicate comprehensive program budget and regularly reconciles our numbers with yours.
- Sets up uniform checklists and forms for vendors, stakeholders, and Section 3 and MBE participants.
- Reviews all pay requests and change orders for accuracy and appropriateness.
- Drafts all Federal, State, or private funding and reporting agency reports for staff review.
- Sets up your filing system and regularly self-monitors it for completeness.

• T.A. with and understand the reporting requirements imposed by Federal and State agencies and in turn the requirements they impose on local governments.

Equally important in ensuring that the County is in the best position to successfully apply and qualify for future grants:

- We meet with your County Staff, elected officials, department directors and other stakeholders to discuss immediate concerns and priorities.
- We research potential Federal, State, and private leverage resources and provide recommendations for potential financial match and their requirements, allowing you to evaluate match opportunities.
- We develop all manner of policies and procedures related to implementation of grant and loanfunded programs, including all processes, grant policy, procedure guidelines, W/MBE, Section 3, URA guidelines, and many more.
- We develop public notices, RFPs, agreements, policies, and other grant-related documents.
- We will develop a step-by-step Task Plan that allows us to work in partnership with your staff and maximize your resources and partners.
- We represent you at public and Commission meetings when needed or requested.
- We utilize existing relationships with vendors, contractors, lenders, title search companies, realtors and many others serving your area.
- We provide a one-stop toll-free number dedicated to our clients and businesses.
- We work with myriad Federal and State funding sources to create and administer grant, developer, subrecipient and construction agreements.
- We cover every facet of grant and loan-funded applications, administration and implementation with checklist and trading.
- We provide draft forms and field experience to document all funding requirements, from environmental review to intake to construction to closeout.
- We provide successful strategies for meeting milestones and objectives.
- We draft bid grant specs and guide advertising for and vetting contractors and vendors in the best interest of our communities.
- We provide contract requirement guidelines established for pre-construction meetings and will provide technical training for the contractor(s) and their subs.
- We provide the Project Engineer and/or Architect with an electronic version of a standard document guide, supplemental conditions for specific grant & include the Wage Decision(s) for the project, as applicable.
- We develop quality inspection records and progress reports for immediate review.



# KEY TEAM MEMBERS PERFORMING WORK UNDER AWARD



The Guardian team brings to Hernando County extensive experience in the planning, application, program administration, and compliance of Federal and State funded grant and loan-funded programs, including CDBG & SHIP. When you engage the Guardian team, we commit to being on site with you as often as is required. We understand the importance of face-to-face time, and we take it very seriously. Key industry professionals own and manage the business as well as serve your projects directly.

Christine Alday President/CEO	Will provide overall project financial tracking & review, oversight, and controls for funding, & contract review.	<ul> <li>Over 21 years of audit, accounting, &amp; fiscal management.</li> <li>15 yrs. grants consulting, program administration.</li> </ul>
Corbett Alday Vice President/COO	Will provide experience in environmental review, research, grant application, implementation & management of federal & state prog.	<ul> <li>27+ years of grants consulting and program admin/experience.</li> <li>130+ projects, and Economic Development of 2,500 jobs.</li> <li>Creative layering expertise</li> <li>Engineering background</li> <li>ENVRR Specialist</li> </ul>
Don Ridley Licensed Building Inspector Director of Construction Administration	Will provide technical assistance in relation to all construction development programs.	<ul> <li>36+ years of construction exper.</li> <li>with seven major disaster events.</li> <li>100+ infrastructure jobs</li> <li>2,500+ housing units</li> </ul>
Antonio Jenkins Project Manager/Housing Specialist	Will provide inspections, work-write-ups, bid documents, NTB, and NTP. Create/track project constr. budget, monitor, approves construction/contractor pay.	<ul> <li>14+ years of extensive operations/project experience.</li> <li>1,000+ housing units</li> <li>Well versed in building standards</li> <li>Oversees CDBG/SHIP/NSP rehab/new construction projects.</li> </ul>
Jean Rags Project Coordinator/Technical Advisor	Will provide review of grant application. Local polices/procedures and funder requirements.	<ul> <li>21+ years of government and federal and state grants.</li> <li>Implement/manage CDBG housing projects in local govt.</li> </ul>
Gayle Brett-Sub Consultant Program Specialist	Will provide grant research & prep, state government expertise & insight, review grant docs. Property review & acquisition exper.	<ul> <li>26+yrs working for FDEO &amp; FDEP.</li> <li>Years of experience in buying, selling/managing real estate transactions for the State, counties, cities &amp; private sector.</li> </ul>
Marina Edwards Program Manager	Will maintain records, notices, meeting materials, conduct on-site file maint. Prepares/processes environmental reviews.	<ul> <li>7 years direct grant experience</li> <li>Years of non-profit work in housing rehabilitation and new build experience.</li> </ul>
Dawn Cobb Grants Administrator	Assist applicants, tracks all forms of verification. Reviews budgets/ financial plans for accuracy and appropriateness.	<ul> <li>18 years' experience with local government recipients</li> <li>9 years' experience as a Housing Program Coordinator</li> </ul>
Eliana Alday Grants Assistant	Applicant appointment scheduling, maintains server & client files.	Intern training on SHIP/CDBG compliance and administration



The Guardian Team has been successful in maintaining numerous repeat clients, continuing to bid competitively, and keeping client satisfaction and quality service at the forefront of our practice. Guardian's projected workload for the next 24 – 36 months consists of 12-14 clients and 15-17 grant projects, not including any programs we might administer on behalf of your community. The Guardian Team will dedicate ample resources to your projects, including acquiring additional office space and staff as needed.

The following presents a summary workload for the Guardian team:

City of Avon Park CDBG Housing Rehabilitation	90% complete
City of Avon Park CDBG Mitigation Fire Station	New
City of Avon Park CDBG Mitigation Water System	New
Citrus County DRI CDBG Housing Demo/Replace	50% complete
Citrus County CDBG Economic Development	10% complete
Columbia County CDBG Economic D Truck Stop	10% complete
Columbia County CDBG DRI Paving and Drainage	New
Columbia County CDBG DRI Road/Paving/Drainage	New
Columbia County CDBG Housing Rehabilitation	New
Desoto County CDBG Environmental Review	100% complete
Hendry County CDBG Housing Rehabilitation	100% complete
Hendry County SHIP Housing	Ongoing by Task Order
Hernando County CDBG Housing Rehabilitation	100% complete
Indian River County CDBG Housing Rehabilitation	90% complete
Indian River County SHIP Housing	Ongoing by Task Order
City of LaBelle CDBG Neighborhood Revitalization	100% complete
Town of Lake Placid Rural Infrastructure Fund	New
Town of Lake Placid Legislative Project	New
Town of Lake Placid State Revolving Fund	New
Town of Lake Placid CDBG Commercial Rev.	New
Martin County CDBG Housing Rehabilitation	100% complete
Martin County SHIP Housing	Ongoing by Task Order
Osceola County Environmental Review	10% complete work order
City of Palm Coast Entitlement Housing	2020-100% complete, 2021 99% complete 2022 - New
City of Palmetto CDBG Economic Development	10% complete
Putnam County SHIP Housing	Ongoing by Funding Year
City of Sebastian Entitlement CDBG	Ongoing by Funding Year
Sebring Airport FEMA Technical Assistance	Ongoing
Spring Lake Improvement District Sewer Mains	90% complete
Spring Lake Improvements District Water Plants	New
City of Stuart CDBG Housing Application	New
Taylor County CDBG Housing Application	New
City of New Port Richey CDBG Housing Application	New
Columbia County ARPA Emergency Assistance	New
City of St. Augustine CDBG-CV	New
City of Stuart CDBG-CV	New
City of Lake Worth Beach CDBG-MIT	New
Lee County Entitlement CDBG	New





# Christine Alday, President and CEO

Ms. Alday is the owner and President of Guardian Community Resource Management, Inc. She has been working with grants and loan-funded programs since 2005. Her prior experience was working for a private Fortune 500 company as an Accountant and Auditor. Christine has "hands on" financial management experience with federal, state, local and private funding sources. Christine Alday has extensive experience with funding-agency contracts and managing and tracking all manner of grants and loan-funded project dollars and is responsible for the overall financial management of each project.

#### **Education/Certificates**

Masters - Accountancy, Univ. of S. Florida BA, Accounting, Univ. of S. Florida

#### Professional Assoc.

President, West Central Florida Chapter, Grant Prof. Association Woman of the Year 2012-2013 by National Assoc. of Prof. Women Fl. League of Cities Fl. Assoc. of Counties Fl. Comm. Dev. Assoc. Fl. Green Bldg. Coalition Amer. Women's Bus. Assoc. Lakeland Chapter

#### Training

NSP, CDBG, SHIP, HOME, USDA, HUD and FDEO Wrkshp/Webinars OIG fraud training CDBG Rule Hearings, Appl. & Imple. Wrkshops Florida in the Sunshine and Ethics Seminar

#### **CDBG Projects**

Lake Placid, City of Labelle, City of Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties, Spring Lake Imprv.Dist.

# Professional highlights and duties:

Ms. Alday develops financial tracking for all grants and loan-funded federal and state projects and ensures accurate financial management. She has over twenty-one (21) years of audit, accounting, and financial management experience, and over fifteen (15) years of grants consulting and program administration experience. She is responsible for contract management, monitoring preparation and managing client relations. She has worked on housing and infrastructure projects totaling more than \$200,000,000 in funding from myriad sources.

- Creates a duplicate project budget and reconciles it regularly with the local government and the funding agency.
- Reviews budgets and financial plans for accuracy and appropriateness.
- Coordinates with client auditors on financial questions related to the grants.
- Conducts a review of all grant close-out packages and provides a balance of project budgets prior to closeout.
- Reviews client procedures/policies as needed, including substantive tests of internal controls, & evaluate internal methodology.



# J. Corbett Alday, Vice President/COO

Mr. Alday's career in public funded projects began over twenty-seven (27) years of grant experience, and over 130+ projects and economic development of 2,500 jobs. He is the lead Project Administrator for all our projects. During his career, he has continued his work with Small Cities CDBG, adding work experience in a vast array of public funding sources. These include: Special Appropriation Disaster Recovery CDBG, Entitlement, HMGP, SHIP, USDA, SRF, FDEP, FDOT, OTTED, EDA, EPA, SWFMD, SRWMD, STAG, Section 108 CDBG, FRDAP, FEMA, HUD, SBA, HHRP, FHFC, NSP, and many others.

#### **Education/Certificates**

Bachelor's Degree in Engineering, Fl. State Univ. AA in Drafting Technology

#### Professional Assoc.

Florida League of Cities Florida Assoc. of Counties Lake County League Cities Florida Comm. Development Association Florida Green Bldg. Coal. Grant Professionals Association

#### Training

NSP, CDBG, SHIP, HOME, USDA, HUD, FDEO Wrkshp & Webinar Green Bldg. Training Ser. HUD/ENVRR/RROF tr. Storm Water Utility Rate, Planning, Utility Develp. & Fin. Courses FEMA HMGP/FMGP TS CDBG Rule Hearings, Appl. & Impl Wkshops, CDBG Sect 108 Wkshop. Florida Sunshine/Ethics GIS for Comm. Dev Prof.

#### **CDBG Projects**

Lake Placid, City of Labelle, Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties, Spring Lake. Imprvmt. Dist. Gateway District, Sebring, Sebring Airport.

# Professional highlights and duties:

Mr. Alday is the leading expert in the State in the area of creative layering – the linking of multiple funding sources. For hundreds of projects, he has helped communities match sound technical solutions with the special restrictions of grant-loan programs.

Mr. Alday has experience working in over fifty (50) communities in excess of twenty (20) different sources of funding totaling more than \$500 million!

Mr. Alday has extensive project management experience from grant writing to implementation to close out. He has successfully implemented HUD's Environmental Review Record (ENVRR) requirements on numerous projects.

- Conducts grant-loan funding research and performs site investigations & preliminary scoring to determine community needs and grant funding feasibility.
- Conducts needs analysis, grant research and prepares draft application writing.
- Develops layering recommendations and preliminary applications activities.
- Participates in and oversees bid and construction management, Davis Bacon and manages the environmental review processes consistent with NEPA requirements.
- Serves as Project Manager on this RFP.



# Donald M. Ridley, Construction Manager/Technical Support

Mr. Ridley brings over thirty-six (36) years of grant experience and 2,500 housing units completed including construction oversight experience to our team of seven (7) declared disaster events. Mr. Ridley is experienced in FEMA disaster recovery programs, including all forms, policies and procedures related to disaster events i.e. Public Assistance worksheets and HMGP. He is a recognized construction professional in Florida with a wide range of relevant experience: site development, housing, utilities, water and sewer plants, power plants, earthwork, foundations, concrete, masonry, steel, welding, painting and roadway construction. Don provides technical assistance to all construction development projects.

#### **Education/Certificates**

Business Education from Jones Business College State Licensed Standard Inspector, BN-0001431 Certified SBCCI Housing Rehabilitation Certified SBCCI Bldg. ACI, NICET, FI DBPR Lic ICC and BOCAI Inspector

#### **Professional Assoc.**

Florida League of Cities Florida Assoc. of Counties Lake County Lg. of Cities FL Comm. Develp. Assoc. Osceola Grants Res. Network International Code Council

#### Training

FDEO NSP TA Training
HUD ENVRR & RROF Tr.
US HUD Envrr. Review Proc.
My Safe Fl. Home Inspector
FL Bldg. Code Advanced Building Structural Summary
Inter Codes 2: Occp & Loads
FL Building Code Advd.
Resid-Floors, Walls/Roofs
FL Building Code Advd. -IEQ
ADA Guidelines: Access. Rt.

CDBG Projects
All open projects

# Professional highlights and duties:

Mr. Ridley is well versed in permit and grants regulatory issues and understands the special restrictions of public grant-loan funded projects. Mr. Ridley is highly experienced in construction plans review, time management and cost control.

In addition, Mr. Ridley has worked with more than one-third of the Florida counties and municipalities as well as many leading engineering and construction firms. He has extensive experience with post-disaster redevelopment issues and has managed and inspected development projects for streets, downtown, water and sewer works totaling over \$300,000,000.

- Participates in site inspections & investigations, field verification of quantities and adherence to project specifications.
- Participates in on-site compliance monitoring, for regulations related to Davis Bacon, Section 3, Copeland "Anti-kickback" Act, W/MBE and others.
- Participates in project development and implementation; oversight in bid and construction management, and review of environmental issues.



# Antonio Jenkins, Specialist Project/Construction Manager

Mr. Jenkins has over fourteen (14) years of extensive operations and project coordination experience in over 1,000 housing units and is well versed in the latest building standards and codes. Antonio manages the construction administration and project representation for our land development and housing programs, including CDBG, NSP, SHIP, HOME, and others. Additionally, Mr. Jenkins has an extensive background in social and operations management which enables him to provide excellent client customer service and serves as an invaluable asset in the-field and when face-to-face time is required with clients.

#### **Education/Certificates**

Bachelor's Degree in Political Science, Valdosta State University Certified Inspector My Safe Florida Home Florida Green Home Designation Certification

#### Professional Assoc.

Florida League of Cities Florida Assoc. of Counties Lake County Lg. of Cities FL Comm. Develop. Assoc. Fl. Green Bldg. Coalition

#### Training

NSP / CDBG / SHIP / HOME / USDA / HUD / FDEO Workshops and Webinars Lake & Volusia County 2011 Annual Green Symposium **HUD Section 3 training** Issues/Challenges of Owner-Occupied Rehab FDEO NSP TA Training HUD ENVRR & RROF Tr. Green Building Tr. Series CDBG Rule Hearings, Appl / Impl. Wkshops U.S. HUD Envrr. Review My Safe FL Home Inspector

#### **CDBG Projects**

Lake Placid, City of Labelle, City of Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties,

# Professional highlights and duties:

Mr. Jenkins' primary duties include project delivery services and construction oversight, including single family homeownership and multi-family homeownership & rental for NSP and for CDBG implementation, in addition to oversight of construction bidding, contractor vetting and program management.

Mr. Jenkins continues to oversee the construction and / or rehabilitation of 1,000+ multi and single-family housing units and the construction oversight of various other grant funded infrastructure projects.

- Conducts orientation sessions for contractors and vendors.
- Conducts site inspections for compliance.
- Reviews/recommends changes to local HAP.
- Conducts HUD Tier 2 Environmental Reviews.
- Reviews mortgage & construction contracts.
- Conducts monitoring of single/ multi-family rental construction.
- Conducts & provides inspections, work-write-ups, bid documents, NTB, and NTP.
- Creates/tracks project construction budget; reviews, monitors, approves construction and contractor pay authorizations.



# Jean Rags, Project Coordinator/Technical Advisor

Ms. Rags has over twenty-three (23) years of government and grants experience. Ms. Rags successfully implemented and managed in excess of \$15 million dollars through Community Development Block Grant (CDBG) projects for seven (7) Housing Rehabilitation and Economic Development projects and the application and implementation of the Neighborhood Stabilization (NSP1 and NSP3) Grant Programs in Hernando County from 1999-2012. Jean conducts grant research and funding resource analysis, drafts local policies and procedures for our clients to meet funder requirements, and reviews / edits contracts and grant related advertisements, memos and documents. Jean also provides marketing and proposal responses on behalf of Guardian.

#### **Education/Certificates**

Bachelor of Arts, Major in Human Services, Minor in Social Services, St. Leo College Associate of Arts, Pasco-Hernando State College NIMS Series ICS100B, ICS200B, ICS007A Certifications

#### **Professional Assoc.** Notary Public, State of FL

#### **Training**

NSP3 HUD Workshop FDEO NSP1 TA Training FDEO E-CDBG training NSP Implemt. Workshop CDBG Rule Hearings, Application/ Implementation Workshops FDEO DRGR Webinar Tr. NSP Workshops/Webinars FHC Annual Statewide Affordable Housing Conference

#### Projects

All open and potentially new projects.

# Professional highlights and duties:

Prior to joining Guardian in 2012, Ms. Rags was the Director for Community Development in Hernando County, where she was responsible for the oversight and management of numerous County departments in addition to CDBG & NSP programs totally \$15 million.

- Reviews & edits all contracts, policies, amendments & grant documents, prior to submission.
- Markets and develops proposals in response to open RFP, RFQ, and RFI's.
- Participates with attendance and representation as needed at client offices, public meetings.
- Provides development and review of grant management policies and procedures.
- Develops grant required documents, (e.g. Housing Assist. Plans, policies & procedures.
- Assist in monthly client billing review, calculations and invoicing as needed.



# Gayle Brett, Sub-Consultant / Program Specialist

Ms. Brett has 20+ years of government, grants and real estate experience working in both the private sector and also for the State of Florida in various state and federal programs. Previously, she worked for Fl. Depart. of Economic Opportunity (FDEO) Housing and Community Development Section with the NSP & CDBG programs and also in Florida Communities Trust (FCT), a land buying program that received \$66 million per year to assist cities and counties in purchasing property, negotiating, contracting/ closing as needed. Ms. Brett has eight (8) years of employment in private sector real estate, and previously held both a Real Estate Sales Associate and Broker license. Ms. Brett is responsible for providing program administration for NSP1, NSP3, CDBG & SHIP programs in Osceola, Martin, Flagler, Putnam, Hernando counties and others.

# Education/Certificates Davis Productivity Award as part of the team that implemented State of Florida's NSP 1 award

Professional Assoc. Florida Real Estate Sales License Tallahassee Board of Realtors ®

Natl. Assoc. of Realtors ®

Training

SHIP Prog. Admin. Webinar **HUD Prog Income & NSP** Admin. Strategies HUD NSP Closeout Webinar Annual CDBG Tr. Workshop NSP 3 Appl/ Impl. Workshop HUD Tr. Web-NSP1 & 3 HUD Fair Housing Training National Right-of-Way Assoc: Leadership Skills for Real Property Prof Intro.to Prop. Mgmt., Real Prop. Asset Mgmt./Surv Fl. Real Estate Assoc. & Broker Licensing (not lic.) FDEO e-CDBG Webinar HUD **DRGR Stand Reports** Webinar Conference

CDBG Projects City Palm Coast; Indian River, Martin, Osceola County

# Professional highlights and duties:

Prior to joining Guardian in 2012, Ms. Brett worked with FDEO's Housing and Community Development department in the oversight and implementation of the state's NSP Program.

She also worked with the FDEP; Division of State Lands, in the Conservation and Recreation Lands Program, Preservation 2000 and Florida Forever Programs.

Ms. Brett's career has been built on good communication skills and bringing her real estate expertise into streamlining the state government land buying, selling and management practices.

- Reviews and edits all real estate contracts, appraisals, title insurance commitments, policies, closing statements, documents and mortgages.
- Communicates with real estate agents, brokers, banks and appraisers to better assist our clients in maintaining grant compliance.
- Attends public meetings/hearings and conducts grant compliance monitoring.
- Develops grant required documents.
- Reviews/edits drafts of required agency reports: MSR, MBE, Section 3, quarterly status reports and other grant related reports.
- Research, preparation and processing of SHIP payoffs and Satisfactions



# Marina Edwards, Program Manager

Ms. Edwards' experience with applicants for non-profit programs has been invaluable as she coordinates all of Guardian's Applicant intake for local government recipients. She has been working withgrants since 2016. Her prior experience was working for non-profit organizations as Development Director and Community Relations Director. Marina has experience with federal and state, grant regulations and requirements and remains current with all new CDBG and SHIP housing trainings and webinars. She has advance technology skills and is proficient with all Microsoft software and other related system programs and applications, server maintenance, and all office related technologies.

#### Education/Certificates

Minster College - United Kingdom - BTEC City and Guilds diploma in Art & Design

# Professional Assoc.

National Notary Association

#### Training

Habitat for Humanity Mortgage and Homeownership Training

**CCTCP Training** 

Various grant writing workshops

HUD Environmental Review Procedures

SHIP Intake/Report Training

#### **CDBG/SHIP Projects**

**Putnam County SHIP** Hendry County SHIP/CDBG Martin County SHIP/CDBG Citrus County CDBG City of Avon Park CDBG City of Sebastian CDBG Osceola County CDBG Columbia County CDBG/ARPA City of New Port Richey CDBG Taylor County CDBG City of Stuart CDBG Town of Lake Placid CDBG Desoto County CDBG Indian River County CDBG/SHIP City of St. Cloud CDBG City of St. Augustine CDBG City of Lake Worth Beach CDBG

# Professional highlights and duties:

Ms. Edwards is responsible for the review, vet, creation, and management of all client related files including contractors, subcontractors, homeowners, homebuyers, renters. She is responsible for the maintaining of records, preparing public notices, materials for meetings, and conducts on-site file maintenance, prepares and processes environmental reviews.

She provides support and assistance to all team members daily and assists in the management of administrative project requirements to maintain efficient records/reports and timely responses.

- Assists with tracking project statistics and applicant demographic information.
- Oversees the review of individual/household applications to determine eligibility.
- Reviews clients grant administrative files to ensure those files are complete and audit ready.
- Assists with all grant reporting, based on applicable grant requirements, including Fair Housing, Civil Rights, MBE & Section 3.
- Prepares and processes environmental review records and coordinates with agencies and Tribes for consultations
- Prepares documentation for Request for Release of Funds on behalf of clients
- Prepares documentation for modifications to subrecipient award agreements on behalf of clients



# Dawn Cobb, Grant Administrator

Ms. Cobb's experience with applicants has been invaluable as she coordinates all of Guardian's Applicant intake for local government recipients. Her prior eighteen (18) years experience was with a local government municipality and the last nine (9) years as their Housing Program Coordinator which overseen all of their housing programs (SHIP, CDBG,NSP and HOME).

# Professional highlights and duties:

#### **Education/Certificates**

Becker College - AA Degree

Certificates: FEMA-MGT470FLestablishing collaborative case management

FEMA-MGT471RX-Executing strategies to rapidly rehabilitate damaged houses

FEMA-IS-00100.C-Incident Command System, ICS-100

FEMA-IS-00700.b-National Incident Management System

Florida Housing Finance-Proficiency in income qualification

#### **Professional Assoc.**

#### Training

SHIP/CDBG WORKSHOP

#### **CDBG/SHIP Projects**

City of Stuart CDBG Columbia County CDBG Columbia County ARPA Putnam County SHIP Martin County SHIP/CDBG Indian River CDBG Ms. Cobb is responsible for all Guardian grant recipients' Applicant screenings, third party verifications and updates for all digital and hard copy applicant files. She ensures that all relevant documentation is acquired from the applicant as per the program requirements.

- Assists applicants with required application and documentation queries.
- Tracks applicant information ensuring all relevant documentation is acquired, and information remains current as per the program requirements.
- Verifies licenses, company status and references for all contractors.
- Compiles and verifies environmental impact reports and studies.
- Reviews budgets and financial plans for accuracy and appropriateness.
- Coordinates with client auditors on financial questions related Conducts a review of all grant close-out packages and provides a balance of project budgets prior to closeout.
- Reviews client procedures/policies as needed, including substantive tests of internal controls, & evaluate internal methodology.

# Eliana Alday, Grants Assistant

Ms. Alday is our most recent Guardian Team member. She is invaluable in scheduling applicant appointments, maintaining our company server and maintaining applicant files to ensure they are audit ready.

# Professional highlights and duties:

Ms. Alday is responsible for all Guardian





Hernando County Board of County Commissioners

15470 Flight Path Drive Brooksville, FL 34604

(352) 754-4000

Contact:

Hernando County Health & Human Services

Veda Ramirez - Manager

621 Jefferson Street Brooksville, FL 34601

(352) 540-4338

vramirez@co.hernando.fl.us

Projects:

**CDBG-Housing Rehabilitation FY2015** 

Housing rehabilitation of 11 units

Awarded June 2017 - Completed June 2021

Project was completed within budget. Due to COVID

impacting the availability of construction materials, a time

extension was requested to complete the projects.



Client: Martin County Board of County Commissioners

435 Southeast Flagler Avenue

Stuart, FL 34996 (772) 419-6932

Contact: Martin County Human Services

Michelle Miller - Human Services Administrator

435 Southeast Flagler Avenue

Stuart, FL 34996 (772) 288-5735

mmiller@martin.fl.us

Projects: CDBG-Housing Rehabilitation FY2017

Housing rehabilitation of 11 units

Awarded September 2017 – completed April 2022

Project was completed within budget. Due to COVID

impacting the availability of construction materials, a time

extension was requested to complete the projects.



City of Avon Park

110 E Main Street

Avon Park, FL 33825

(863) 452-4400

Contact:

City of Avon Park Finance Department

Melody Sauerhafer - Finance Director

110 E Main Street

Avon Park, FL 33825

(863) 452-4410

msauerhafer@avonpark.city

Projects:

CDBG-Housing Rehabilitation FY2017

Housing rehabilitation of 11 units

Awarded December 2018 - anticipated completion

December 2023

Project is within budget. Due to COVID impacting the availability of construction materials, a time extension was

requested to complete the projects.



**Indian River Board of County Commissioners** 

1801 27th Street

Vero Beach, FL 32960

(772) 567-8000

Contact:

Indian River Planning Department

Chris Balter - Chief of Long Range Planning

1801 27th Street

Vero Beach, FL 32906

(772) 226-1250

cbalter@ircgov.com

Projects:

**CDBG-Housing Rehabilitation FY2017** 

Housing Rehabilitation of 11 units

Awarded December 2018 – anticipated completion January

2023

Project is within budget. Due to COVID impacting the availability of construction materials, a time extension was requested to complete the projects.



Client: Columbia County Board of County Commissioners 135 NE

Hernando Avenue Lake City, FL 32055 (386) 866-4100

Contact: Columbia County Administration

David Kraus - County Manager 135 NE

Hernando Avenue Lake City, FL 32055 (386) 758-1005

David kraus@columbiacountyfla.com

Projects: CDBG- Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client: City of New Port Richey

5919 Main Street

New Port Richey, FL 34652

(727) 853-1016

Contact: City of New Port Richey Planning

Lisa Algiere – Senior Planner

5919 Main Street

New Port Richey, FL 34652

(727-853-1050)

AlgiereL@CityofNewPortRichey.org

Projects: CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client: Taylor County Board of County Commissioners

201 E. Green Street

Perry, FL 32347 (850) 838-3500

Contact: Taylor County Grants Department

Jami Evans - Grant Coordinator

401 Industrial Park Drive

Perry, FL 32347 (850) 838-3553

jevans@taylorcoutygov.com

Projects: CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Citrus County Board of County Commissioners

110 N Apopka Avenue Inverness, FL 34450

(352) 341-6560

Contact:

Citrus County Housing Services

Michelle Alford - Director

2804 W. Marc Knighton Court

Lecanto, FL 34461 (352) 527-7520

michelle.alford@citrusbocc.com

Projects:

CDBG-DRI Housing Rehabilitation

Demolition and reconstruction of 3 homes

Awarded June 2019 – Anticipated completion September

2023

The budget for these projects was increased from \$1m to \$1.6m as these projects needed to be elevated to 2ft above the Base Flood Elevation (BFE) therefore requiring the projects to become demolition/reconstruction projects. Due to COVID impacting the availability of construction materials, a time extension was requested to complete the projects.



City of Palm Coast

160 Lake Avenue

Palm Coast FL 32164

(386) 986-2360

Contact:

City of Palm Coast Planning & Zoning

Jose Papa - Senior Planner

160 Lake Avenue

Palm Coast, FL 32164

(386) 986-2469

jpapa@palmcoastgov.com

Projects:

CDBG Entitlement Housing Rehabilitation

Ongoing housing rehabilitation

Guardian has been contracted with the City of Palm Coast

Housing Rehabilitation project since 2013.



City of Stuart

121 SW Flagler Avenue

Stuart, FL 34994 (772) 288-5300

Contact:

City of Stuart-Community Redevelopment Agency (CRA)

Pinal Gandhi-Savdas - Director

121 SW Flagler Avenue

Stuart, FL 34994 (772) 283-2532

pgandhi@ci.stuart.fl.us

Projects:

CDBG-Housing Rehabilitation FY2019

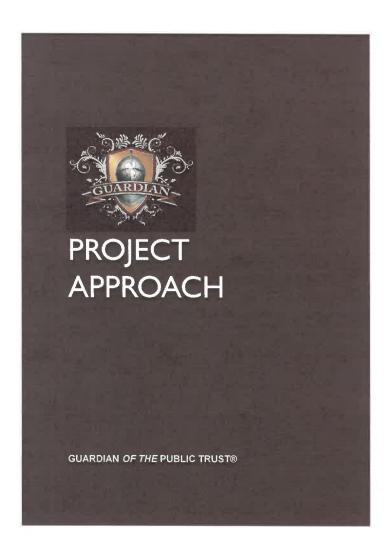
Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

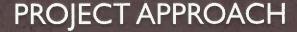
2024

This project is currently underway and is expected to remain





- Our approach and success in grant writing, program administration and compliance are comprehensive, detailed, and follows a proven work plan centered on quality control. We measure our performance by the benchmarks we establish based on research, funding, administration, compliance requirements and construction timelines and funder requirements.
- Guardian does not anticipate using any sub consultants in this project.





- Preliminary Activities:
- Background research to identify project/program needs & networking with County Staff, elected officials, department directors to determine priority needs & formulate appropriate grant proposals and solutions.
- > Develop leveraging strategies for each potential funding source.
- Kick-off meeting with County Staff; review all requirements and meet with any businesses, organization partners, and other team members who may provide, GIS mapping, engineering documents, etc.
- Meet with local agencies and organizations that support the County's funding needs and priorities to determine potential collaborative or matching opportunities.
- > Prepare & attend all required Public Hearings, County Commission meetings, CATF meetings, and Fair Housing activities.
- > Review and/or develop new policies required for the grant submission process.
- > Develop grant proposals outlining potential leveraging and/or match opportunities.
- > Develop grant applications and provide ongoing technical support to staff.
- > Prepare and submit final grant applications following County Commission approval.
- > Prepare for and provide representation and support during site visits.
- > Prepare/provide representation and support during community outreach or orientation seminars



- Complete supporting documents for grant award contract documents.
- Complete grant agreement work plans and budgets.
- Develop required project record and filing system for all local/original documents.
- > Establish a duplicate grant contract file system for tracking grant activity (electronic format preferred).
- > Establish a master schedule with benchmarks and timelines.
- > Prepare all required public notices.
- Prepare required request for comments.
- Prepare any needed maps or supporting documentation.
- > Policy and procedure review, including developer and/or non-profit agreements.

# Post Award Activities:

- Prepare Environmental Review Records (ENVRR).
- Prepare FONSI advertisements and Request for Release of Funds (RROF).
- > Site/project specific inspections and ENVRR checklist as needed.
- > Review/update/develop any required grant policies and procedures manuals.
- Review all grant agreements for compliance and special conditions.
- > Establish grant performance measures and benchmarks of performance.
- Develop program forms and checklist for intake qualifications, bidding and contracting.
- > Provide a sample / review/ update RFP/RFQ for contractors and vendors.
- Recommend short list of vendors (e.g. construction contractors, surveyors, & other needed services).
- Vet all contractors and vendors.



### Outreach, Partner / Vendor Training & Support / Interface with County:

- > Develop operating procedures & accompanying checklists, standardized reports for partners and vendors.
- Provide training, support, monitoring of day-to-day activity of partners, vendors.
- > Provide sample grant required forms, vetting forms, forms of agreement for contractors, partners, and vendors.
- Write RFP scopes of work and provide 2 CFR 200 and State language.
- > Attend pre-bid and bid meetings for support.
- > Write technical assistance answers to bid questions, including Technical assistance to selection committees.
- > Develop scope and federal developer agreements.
- Quarterly zoom progress and strategy meetings.

# Compliance Monitoring:

- > Oversee project schedule and compliance, including regular monitoring & updates.
- > Representation during monitoring/site visits, audits and community meetings.
- > Coordination with other agencies, partners, recipients and contractors.
- > Provide all other necessary technical assistance to staff and contractors.
- > Prepare regular status reports, e.g. grant funding report, grant contract status, quality control activities & results, major accomplishments, success stories, etc., noteworthy meetings/accomplishments, work plan issues, budget and uses of funds.



- Updates to HUD 2880 disclosures, Section 3 and MBE/WBE performance reporting.
- Procedures for comprehensive identification of beneficiaries, if applicable.
- Create monitoring, documentation and reporting of the efforts and results.
- Monitor all regular grant-funded project activity to ensure compliance.
- Davis-Bacon compliance for relevant activities, e.g. review of related contractor payrolls, wage interviews, project photos, etc.
- > Request Wage Decisions where applicable and provide sub-grantee/contract guidance for specific activities.
- Review construction contract documents and supporting information compliance.
- Review & ensure compliance with applicable laws, e.g., ADA/504 Handicap Accessibility, Uniform Relocation Act and Anti-Displacement, Copeland Anti-Kickback, Civil Rights, Fair Housing, all applicable parts of 24 CFR, and any other related federal requirements.
- Oversight and coordination of citizen input and public meetings (coordination and response to citizen complaints/concerns).
- Develop, process and track amendments (action plans and other plans) where needed.
- > Identify conflicts of interest and coordinate the issuance of a waiver if necessary.
- > Fraud prevention and monitoring.
- Monitoring and prevention of duplication of benefits.





#### Project Delivery Services:

- Conduct initial site visits.
- Meet with the Building Department, Purchasing Department, & other involved departments to coordinate bidding, permitting & inspections as needed for specific activities.
- Advise on / assist with expediting permitting.
- > Provide guidance on establishing & managing construction schedules.
- Develop funder bid conditions for construction bid and review bid specifications prior to advertisement.
- Assist with finalizing the Scope of Work (construction bid).
- Work with your staff to bid out, select & receive approval for contractors and bids.
- Coordinate meetings with staff and contractors to review and sign construction contracts, related documents.
- > Attend & provide technical assistance during any pre-bid, pre-construction conferences, & progress meetings as needed on all projects.
- > Review the Notice to Proceed for compliance so construction can begin.
- Provide quality assurance/grant compliance construction inspections. Work with Building Department to coordinate inspections & approval of draw requests.
- Review all pay applications and change orders before approval.
- > Review final construction documents for completeness.
- Davis Bacon Compliance



# Financial Oversight:

- Assist with implementing an internal budget and setting up purchase orders, as needed.
- Review & advise on project financial management system for receiving/disbursing funds.
- Assist with financial reporting required by the funder.
- Assist with all Requests for Funds (RFF), working with County Finance Department.
- Review, advise, and establish layering plans for each program's eligible budget and activities to coordinate proper use and tracking of layered funds.
- Review pay authorizations and change orders for compliance.
- Review grants amendments for compliance.
- Advise on maintenance of project account records.
- Provide sample time sheets for tracking of eligible grant-funded staff time.
- Assist with responding to external and internal audit questions.
- Monitor developer agreement activities for compliance.



# Project Closeout Activities:

- Balance final project budget.
- > Gather all necessary completion supporting documents.
- > Prepare documents for administrative/financial close out of projects.
- > Research and prepare information/applications for new and continuing grants and their related funding cycles.
- > Document all warranties, release of liens, flood insurance, and related requirements.
- > Document all recordings of mortgage, note of deed restriction.
- All closed agreements documented complete.

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Indian River County Population 159,900	2014- 2017	CDBG-NR	\$750,000	CDBG NR projects were for new sewer lines/components and sewer hookups, and infrastructure for a County firehouse.	
John Stoll Chief – Long Range Planner	2011- 2013	CDBG-NR	\$750,000	The Guardian team provided grant writing, is currently providing program management & project delivery services. The Guardian team will also provide	
(772) 226-1243 jstoll@ircgov.com	2017-	CDBG HR	\$750,000	construction management, contractor bidding and selection, constr. Inspection, Davis Bacon and program administration.	
	ongoing			Guardian provides ongoing initial inspections reports, detailed work writeups, cost estimates, and payment inspections.	
City of Avon Park	2011- 2013	CDBG-HR	\$750,000	The CDBG HR Projects provide housing rehabilitation and or replacement,	
Population 10,400	2017-	CDBG-HR	\$750,000	improvements to owner-occupied LMI/VLI households. 2017 The Guardian team continues to provide grant writing,	THE REAL PROPERTY.
Mark Schrader City Manager mschrader@avonpark.city	current 2020-	CDBG- Mitigation CFHP	\$894,087	program management, project delivery services and financial layering expertise.	
	2020-	CDBG-MIT GIP	\$670,622	CDBG-Mitigation CFHP program will remodel and upgrade existing fire station.	
Hernando County  Population 193,900  Ms. Veda Ramirez, Health & Human Services Manager,	2010- 2012	CDBG-NR	\$750,000, layered with County & City funding, total project cost of approx. \$1M.	CDBG NR Project for new sewer/water lines, fire hydrants, & road restoration in LMI neighborhoods. The CDBG HR project provides for housing rehab for LMI & VLI homes.  The Guardian team continues to provide	1/2
(352) 540-4338 vramirez@hernandocounty.us	2015- 2016	CDBG HR	\$750,000, layered with County SHIP of \$50,000	grant planning/application & program administration, contract prep & implementation, conducted household surveys, project inspections and financial management. Project management includes training, ENVRR, reporting and compliance monitoring throughout the program.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Citrus County Population 149,600	2010- 2012	CDBG-ED + leverage (Wal- Mart)	\$750,000 layered w/private funding of over	Project was for new water lines as part of the construction for job-creating business- Wal-Mart Supercenter CDBG -DRI project is	
Sharon Watkins, Grant Administrator II (352) 527-5208	2015-15	CDBG-HR	\$2M. \$750,000	for demo/replace/elevate LMI homes damaged by hurricanes. CDBG-ED is for a Tech Recycling Plant. Guardian team provides grant application,	Low Price
Sharon.watkins@citrusbocc.com	2018-	CDBG-ED	\$560,000	administration, & program oversight. Including contract preparation implementation, conducting employee	
	2019	CDBG-DRI Infrastructure	\$1,000,000	surveys, project inspections & financial management.	
City of Palm Coast Population 85,900	2013- current	CDBG Entitlement- Housing	\$varies/year based on action plan allocation.	The City contracted with Guardian for assistance with developing and implementing their CDBG Entitlement program. TA with ENVR Reviews,	
Jose Papa, AICP Senior Planner (386) 986-2469	2020-	In progress Grant	2019 - \$20,000 in fees	subordinations, etc.  The Guardian team prepared the City's on sight admin. files and continues to	
The ball in coast dovicous	current	Compliance Assistance Services	in rees	provide housing inspection and work write ups for rehabilitation, ranking of applicants, project oversight, develop entitlement files, forms, polices & procedures for the administration of their CDBG program.	Washington Wallet and the second
Town of Lake Placid	2012- 2014	CDBG-NR	\$650,000	Project was for water treatment plant improvements and wastewater lift station and needed road repaving. The second NR	AND TO SERVICE OF
Population 1,900  Joe Barber Town Engineer/Utility Director	2017- 2018	CDBG-NR FEMA Pre Disaster	\$650,000 \$500,000	project was for building upgrades and modifications, generators, and construction of waste-water treatment plant. FEMA funds were used for generators. The Guardian team members provided funding	
(863) 699-3747 Iputilities@mylakeplacid.org	2017	CDBG-CR*	\$700,000	research, grant writing, financial leveraging, and program administration, including contract	Sal Pam John Co.
	2019			prep/implementation, project oversight, and financial management for the grant on all projects.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Osceola County Population 375,700	2009- 2011	CDBG-HR, SHIP	\$1,000,000 layered through SHIP and CDBG funds	Program addressed LMI/VLI homeowner rehab housing units. The Guardian team provided grant writing, program management, housing rehabilitation delivery services and financial layering	
Danicka Ransom Housing Manager (407) 742-8400 dransom@osceola.org	2019- ongoing	CDBG/HOME	Task order	expertise. Guardian continues to ongoing provide general services and tech support/environmental reviews	
Columbia County	2016-	CDBG-NR	\$750,000	NR Project was for the installation of water lines to connect to the city water system	
Population 71,600	2017- 2018	CDBG-ED 17	\$1,000,000	and road pavement.	
David Kraus County Manager	2018	CDBG -ED 18	\$1,500,000	Guardian performed grant administrative services, environmental reviews, project oversight & financial	
(386)623-6320 135 NE Hernando	2019-	CDBG-DRI	\$4,762,257	mgmt. for the grants. CDBG-ED project is expansion of County wastewater treatment	
Avenue, Suite 203 Lake City, FL 32055	2019-	CDBG-DRI	\$3,614,118	plant. A second CDBG ED is for sewer and water mains to a shopping center. <b>Two</b>	
David Kraus@columbiac ountyfla.com	2019	CDBG-HR	\$750,000	<b>DRI projects are for road flooding.</b> New CDBG is for housing rehabilitation.	
Desoto County Population 38,000	2018 – ongoing	Grant Admin/Enviro. Review	Task Order per ENVR task	Project is for housing rehabilitation of LMI/VLI homes.  The Guardian team has been	
Lauri Benson Social Services Director (863)993-4858 I.benson@desotobocc.com				contracted to provide partial grant administration services, including document review and environmental review services for eleven (11) homes.	
City of Palmetto Population 13,600	2019	CDBG-ED	\$1,500,000	City is partnering with a hotel business to provide water, sewer, street improvement and stormwater. The SRF	
Jim Freeman City Clerk (941)723-45470 ifreeman@palmettofl.org	2019- current	SRF	\$8,000,000	funds will provide wastewater treatment plant upgrades.  The Guardian team is providing grant/loan writing & research, grant-loan admin., program management, technical support, and financial layering expertise.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
City of Stuart  Population 16,100  Pinal Gandhi-Savdas  CRA Administrator  772-283-2532  pgandhi@ci.stuart.fl.us	2019-	CDBG-HR	\$750,000	The Guardian team has been contracted to provide Public Grant and Loan Funding Sources for Capital Facilities Planning, Program Administration, and Project Delivery Services for projects in CDBG regular category.	
Taylor County  Population 21,800 Melody Cox 201 E. Green Street Perry, FL 32347 (850) 371-0377 melody.cox@taylorcountygov.com	2019-	CDBG-HR	\$750,000	The Guardian team has been contracted to provide program administrative services for grant/loan funded projects for community and economic development, and Project Delivery Services for projects in CDBG regular category.	THE CAPITAL OF THE
City of Port Orange Population 62,700  Joseph Castro Buyer City of Port Orange Finance Department 1000 City Center Circle Port Orange, FL 32129  386 506-5717	2020 -	HUD/CDBG Technical Assistance	\$70,000 PO and task orders	The Guardian team provides Technical assistance to create programs utilizing U.S. Department of Housing and Urban Development CDBG and Community Development Block Grant-CV funds. Assistance to include developing policies and procedures, application, checklist and continued technical assistance to answer questions and review items for compliance per CA7308.	1867 1867

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
	TO THE	SHIP / CDBG			BULL BEREIT
Martin County  Population 161,000  Michelle Miller Housing Program (772) 228-5456 mmiller@martin.fl.us	2011- 2012 2012- 2013 2013- 2014 2017- open	SHIP CDBG HR  In progress, currently contracted to administer all housing and CDBG programs	\$750,000 NR \$750,000 HR \$750,000 HR	Guardian was contracted for the overall management/compliance of the County's CDBG programs including SHIP. NR was for new sewer mains. HR was for housing rehab. Our responsibilities include: applicant intake, budget tracking, reports to FHIC & BOCC, inspections, SOW, bids, AHAC & public meetings, update LHAP, constr. Rehab, training, pay request approvals & response to client/homeowner.	Golden Gale  Golde
Indian River County  Population 159,900  John Stoll Chief, Long-Range Planning Phone: (772) 226-1250 Fax: (772) 226-1922 srohani@ircgov.com	2014 – ongoing	SHIP Housing Program Inspection Services	SHIP awards have been varied	Guardian team provides initial inspections to inspect all major systems of identified units including; before digital pictures & provide those pictures to County with initial inspection report, prepare detailed work write-up, cost estimate, and submit the work write-up and cost estimate to staff, conducts pre-bid walk-thru for rehabilitation contractors interested in bidding on the project, reviews bids submitted for the project and provides comments to staff, reviews and approves any change orders submitted for the project, visits the job and prepares a punch list of unfinished items for all completed jobs.  Guardian also provides to the County documentation of notifications sent to Contractors and or Bidders, schedules and monitors all inspections in a timely manner and in accordance to contract and bid timelines. Completion of all inspection requirements conducted in accordance with HQS and Housing Plan requirements.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
		Other			
Mike Willingham Registered Agent 128 Authority Lane Sebring, FL 33870 863-314-1300 Mike@sebring- airport.com	2017- 2018 ongoing	FEMA Public Assistance	FEMA Irma	Guardian provides ongoing technical and compliance consulting with FEMA P.A. grants portal and mitigation.	
Gateway Community Development District  Chris Shoemaker District Manager (239)284-0350 Chris.shoemaker@gatewaydistrict.org	2017- 2019- current	State Revolving Fund (SRF)	\$3,000,000+	Project is on the third phase of storm pond erosion control.  Guardian is providing grant research/application services for new FDEP grant and SRF loan opportunities, in addition to other applicable federal, state and other loan application.	
City of Deltona  Jessica Entwistle Administrative Assistant jentwistle@deltonafla.gov 2345 Providence Blvd. Deltona, FL 32725 386-878-8100	2016- current	Open – Tech. Assistance	Work based on Task Orders	Guardian has been contracted to provide Davis Bacon and FDOT compliance monitoring.	Destories
City of Port St. Lucie  Alessandra (Alex) Tasca Community Prog. Admin. Neighborhood Srv. Depart. (772) 871-7395 atasca@cityofpsl.com	2020-	Open- CDBG	Fees assessed by Tasks.	Guardian has just been awarded this contract to provide the City with CDBG Grant Administration to complete the City's 5-year Consolidated Plan.	TO RYDE

Local Government	Fund Year	Type of Grants	Funded Amount		Scope	Project
City of New Port Richey  Population 16,223  Debbie Manns City Manager (727) 853-1021  MannsD@CityofNewPortRichey.	2021-	CDBG-HR	\$750,000	Guardian has just been awarded this contract to provide the City with CDBG Grant Administration.		New Port Richey Generalis
City of Brooksville  Population 8,191  Charlene Kuhn Special Projects Coordinator (352) 754-4986 ckuhn@cityofbrooksville. us	2020-	CDBG	\$750,000	Guardian is providing Grant Writing and Grant Administration services for funding years 2020-2021.		Brooksville
Lake Placid Camp and Conference Center  Dr. Brian Wilson District Super Intendent (239) 561-1313 bwilson@sfnazarene.org	2020-	SRF- WW RIF Septic to Sewer SRF-DW	\$1,800,000 (80% Grant) \$570,000 \$600,000	applicati	n is providing loan and grant on writing and program cration services for funded grants i.	LAKE PLACID Campand Conference Center
City of St. Augustine  Population 14,581  Eric Walters Grants Administration Coordinator (904) 209-4302 ewalters@citystaug.com	2022-	CDBG-CV	\$1,251,299	Administ Francis I Rehabilit Environn	n is providing Grant tration services for the St. House Crisis Center tation Project. Services include nental Review, grant nce and reporting.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
City of Stuart  Population 16,100  Pinal Gandhi-Savdas CRA Administrator 772-283-2532 pgandhi@ci.stuart.fl.us	2022-	CDBG-CV	\$4,791,000	Guardian is providing Grant Administration services for the small business incubator and job training program Project. Services include Environmental Review, grant compliance and reporting.	
City of Lake Worth Beach  Population 38,548  Julie Parham Assistant Director of Water Utilities (561) 586-1798 jparham@lakeworthbeachfl.gov	2020-	CDBG-MIT	\$989,262	Guardian is providing Grant Administration services for the storm hardening of the City's Water Treatment Plant Project. Services include Environmental Review, grant compliance and reporting.	S CORDS





July 28, 2023

Hernando County Board of County Commissioners Erin Kluis Briggs, Grant Writer 15470 Flight Path Drive Brooksville, FL 34604 (352) 754-4020 TBrady@hernandocounty.us

Dear Ms. Briggs:

As President and CEO of Guardian Community Resource Management, Inc. (the corporation), I hereby certify that the corporation maintains, in good standing, active checking and credit accounts with Wells Fargo Bank N.A. The corporation has been a client of Wells Fargo Bank N.A. since December 19, 2018. As the corporation's President and CEO, I certify that it has the stability, resources and the necessary working capital available to complete your project.

Wells Fargo Bank N.A. no longer provides financial status letters to its clients. However, should you need further verification of the corporation's financial stability, please do not hesitate to contact me directly at christine@guardiancrm.com.

Sincerely,

Christine Alday President & CEO

STATE OF FLORIDA COUNTY OF PASCO

The foregoing instrument was executed before me this 28<sup>th</sup> day of July, 2023, by CHRISTINE ALDAY, as PRES/ CEO of GUARDIAN COMMUNITY RESOURCE MANAGEMENT, INC., who is personally known to me OR has produced \_\_\_\_\_\_ as identification.

(SEAL)

NOTARY PUBLIC

Experience, Service, Honor, Loyalty... Guardian
Serving Cities, Counties, CRAs, Housing Authorities, Airports and Your Local Organization
15000 Citrus Country Dr Ste 331, Dade City, FL 33523
Tel. (352) 437-3902 / Toll-free (888)-GUARD93 / Fax (863) 583-0357

www.guardiancrm.com

# 13. VENDOR QUESTIONNAIRE

## 13.1. E-VERIFY CERTIFICATION\*

Vendor/Contractor shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

All persons employed by the Vendor/Contractor during the term of the Contract to perform employment duties within Florida; and

All persons, including subcontractors, assigned by the Vendor/Contractor to perform work pursuant to the Contract with the department.

X Please confirm

\*Response required

# 13.2. ACH electronic payment \*

An ACH electronic payment method is offered as an alternative to a payment by physical check.

Please check Option 1 if you accept the ACH electronic payment method.

(Recommended and Preferred)

X Yes, ACH electronic payment method is acceptable.

☐ No, ACH electronic payment method is not acceptable.

\*Response required

# 13.3. PROPOSER'S CERTIFICATION\*

I have carefully examined the Request for Proposals (RFP), Instructions to Proposers, General and/or Special Conditions, Specifications, RFP Proposal and any other documents accompanying or made a part of this invitation.

I hereby propose to furnish the goods or services specified in the Request for Proposals at the prices or rates quoted in my Proposal. I agree that my RFP will remain firm for a period of up to one hundred and eighty (180) days in order to allow the County adequate time to evaluate the Proposals. Furthermore, I agree to abide by all conditions of the Proposal.

I certify that all information contained in this RFP is truthful to the best of my knowledge and belief. I further certify that I am a duly authorized to submit this RFP on behalf of the Consultant/Firm as its act and deed and that the Consultant/Firm is ready, willing and able to perform if awarded the Contract.

I further certify that this RFP is made without prior understanding, agreement, connection, discussion, or collusion with any person, firm or corporation submitting a RFP for the same product or service; no officer, employee or agent of the Hernando County BCC or of any other Proposer interested in said RFP; and that the undersigned executed this Proposer's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

I further certify that having read and examined the specifications and documents for the designated services and understanding the general conditions for Contract under which services will be performed, does hereby propose to furnish all labor, equipment, and material to provide the services set forth in the RFP.

I hereby declare that the following listing states any clarifications, any and all variations from and exceptions to the requirements of the specifications and documents. The undersigned further declares that the "work" will be performed in strict accordance with such requirements and understands that any exceptions to the requirements of the specifications and documents may render the Proposer's Proposal non-responsive.

NO EXCEPTIONS ALLOWED AFTER THE RFP IS SUBMITTED:

Please check one:
<b>☒</b> I take NO exceptions
$\square$ I take Exceptions, explained in the subsequent answer
*Response required

# 13.4. Exceptions

If you selected "Exceptions" in the preceding question, please enter any exceptions to this RFP

# 13.5. Drug Free Workplace Certification

I have read and attest to, in accordance with Florida Statute 287.087 (current version), hereby certify that,

Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.

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.

Gives each employee engaged in providing commodities or contractual services that are under proposal a copy of the statement specified above.

Notifies the employees that as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, pleas of guilty or nolo contendere to, any violation of Chapter 893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the workplace, no later than five (5) days after such conviction, and requires employees to sign copies of such written statement to acknowledge their receipt.

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.

Makes a good faith effort to continue to maintain a drug free workplace through the implementation of the Drug Free Workplace Program.

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

Please Confirm that you have read and attest to Download Drug Free Workplace Certificate

X Please confirm

13.6. Statement of No Proposal *
Select all that apply
☐ Specifications too tight, geared toward one (1) brand or manufacturer (explain below)
☐ Insufficient time to respond.
☐ Specifications unclear (explain below)
☐ We do not offer this product/services.
☐ Our present schedule does not permit us to perform.
☐ Unable to meet specifications or provide services.
*Response required
13.7. "No Proposal" Explanation
Please provide any necessary explanation as to why you chose not to participate.
13.8. <u>VENDOR/CONTRACTOR SURVEY *</u>
Please provide information on where you received the knowledge of the bid/request for proposals (mark all that apply):
Select all that apply
☑ OpenGov Procurement
□ Newspaper
☐ Purchasing and Contract Department Advertisement Board
□ Other
*Response required
13.9. <u>VENDOR/CONTRACTOR SURVEY (OTHER)</u>
If you answered "Referred" or "Other" in the Survey, please specify:
13.10. Sub-Contractors/Sub-consultants:
The Hernando County BOCC reserves the right to approve all Sub-contractors and/or sub-consultants for this Contract. If Sub-contractors are to be utilized, their names and references must be included within this initial Proposal.
be included within this initial Froposal.

Proposers shall list all proposed Sub-Contractors to be used, regardless of racial or gender grouping. Include names, addresses, phone numbers, type of work Sub-Contracted (discipline, trade or commodity) and proposed percentage of work for each firm.

# 13.11. VENDOR/CONTRACTOR INFORMATION\*

Please Provide the following Information:

- 1. Respondent/Vendor Contractor Name Guardian Community Resource Management, Inc.
- 2. Vendor/Contractor FEIN 13-4309252
- 3. Vendor/Contractor's Authorized Representative Name and Title J. Corbett Alday Vice President & COO
- 4. Address 15000 Citrus Country Drive, Suite: 331, Dade City, FL 33523
- 5. Phone Number (352)-437-3902
- 6. Email Address corbett.alday@guardiancrm.com
- \*Response required

# 13.12. Confirm 180 days proposal validity

Any Proposals shall constitute an irrevocable offer (including pricing), for a period of one hundred eighty (180) days, to provide to the County the services set forth in this Request for Proposals, or until one (1) or more of the Proposals have been awarded.

#### X Please confirm

# 13.13. \*\*VENDOR/CONTRACTOR CERTIFICATION REGARDING SCRUTINIZED COMPANIES\*

Section 287.135 (Current Edition), Florida Statutes, prohibits agencies from contracting with companies for goods or services of \$1,000,000.00 or more, that are on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector Lists which are created pursuant to s. 215.473 F.S. (Current Edition), or the Scrutinized Companies that Boycott Israel List, crated pursuant to s. 215.4725 F.S. (Current Edition), or companies that are engaged in a boycott of Israel or companies engaged in business operations in Cuba or Syria.

As the person authorized to submit bids on behalf of respondent, I hereby certify that the company identified above in the section entitled "Respondent Vendor Name" is not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List. I further certify that the company is not engaged in a boycott of Israel. I understand that pursuant to section 287.135 (Current Edition), Florida Statutes, the submission of a false certification may subject company to civil penalties, attorney's fees, and/or costs and does not have business operations in Cuba or Syria.

#### X Please confirm

<sup>\*</sup>Response required

# 13.14. Affidavit of Non Collusion and of Non-Interest of Hernando County Employees\*

Affidavit of Non Collusion and of Non-Interest of Hernando County Employees

Certification that Vendor/Contractor affirms that the bid/proposal presented to the Owner is made freely, and without any secret agreement to commit a fraudulent, deceitful, unlawful or wrongful act of collusion.

I have read and attest that I am the Vendor/Contractor in the above bid/proposal, that the only person or persons interested in said proposal are named therein; that no officer, employee or agent of the Hernando County Board of County Commissioners (BOCC) or of any other Vendor/Contractor is interested in said bid/proposal; and that affiant makes the above bid/proposal with no past or present collusion with any other person, firm or corporation.

Please confirm that you have read and attest to Affidavit of Non Collusion and of Non-Interest of Hernando County Employees

X Please confirm

\*Response required

# 13.15. Proposal Principals \*

Please name all persons or entities interested in the Proposal as principals.

Provide name, title, mailing address, email address and phone number.

J. Corbett Alday, Guardian CRM, Inc.,

\*Response required 15000 Citrus Country Dr Ste 331, Dade City, FL 33523,
Corbett.Alday@GuardianCRM.com, 352-437-3902

## 13.16. Technical Proposal\*

Please upload a single pdf Proposal package responsive to the tabs referenced in 17.1-17.6 in this vendor questionnaire section.

\*Response required

## 13.17. Proposal Format

The following information shall be submitted in all Proposer responses in the format as specified herein. Failure to submit the requested information in this format may result in a reduction in the evaluation points assigned to your Proposal.

#### 13.17.1. TAB 1 - Statement of Interest and Introduction/Letter of Transmittal.\*

The responding firm (or the lead firm if Sub-Contractors are proposed) will provide a letter, on company letterhead, not exceeding two (2) pages, which serves as a statement of interest and introduction to the submittal. If Sub-contractors are proposed, each Sub-contractor may provide a similar letter, not exceeding one (1) page. This letter will summarize in a brief and concise manner, the Proposer's understanding of the Scope of Work. The letter must name all of the persons authorized to make

representations for the Proposer, including the titles, addresses, and telephone numbers of such persons. An official authorized to negotiate for the Proposer must sign the Letter of Transmittal.

#### \*Response required

# 13.17.2. TAB 2 Organization and Capacity\*

Describe organization's capability to perform services. Provide description of the availability of the Proposer's

assigned staff and client satisfaction with regard to service provided. Repetitive problems with responsiveness,

changes of staff, or delivery of timely and quality service based upon references, direct experience, or discussions

with agencies will be considered. List any Sub-Contractors that may be used to accomplish these services.

#### \*Response required

# 13.17.3. TAB 3 Resume/Staff Qualifications\*

Identify staff to be assigned to the County's projects; provide detailed resumes including only practical, 'hands-on' experience. Hands-on experience with different aspects of single-family property REO's (Real Estate Owned) and other relevant skills will be considered. Any principals, managers, associates, Sub-Contractors, administrative and other organization staff not working on the County's project or with no practical 'hands-on' experience will be scored accordingly. 'Hands-on' shall mean personal experience of the key staff assigned to the County's projects with acquisition/rehabilitation/resale experience. Be sure to address any specific Proposals described above for your particular service.

#### \*Response required

## 13.17.4 TAB 4 References\*

Provide all similar projects within the last five (5) years, inclusive of those specific to you service described above.

Each project must include client contact names and phone numbers for both open and closed acquisitions,

repairs and resales. Include brief descriptions of project. In addition, provide the length of the rehabilitation

project and whether the work was performed on time and within budget. Please include a timeline, total project

costs and all partners with primary contacts for each completed project.

#### \*Response required

#### 13.17.5. TAB 5 Approach to CDBG\*

Provide preliminary project ideas or samples and a detailed approach demonstrating some consideration and research by the Proposer into implementing the CDBG Grant Administration. Provide the steps your

organization must take to implement the services you offer. Be sure to outline those steps specific to

your service, described above. Provide any time-lines of any projects that are similar to these requirements and indicate your organization's ability to meet the time-lines. Identify any unanticipated factors along the time-line.

## \*Response required

## 13.17.6. TAB 6 Financial Information\*

Provide an official letter from the Proposer's financial institution detailing the financial status of the Proposer. The letter shall include a contact name, address, phone number, and fax number. The failure to produce financial requirements may be grounds for disqualification of your offer.

#### \*Response required

#### 13.18. Sworn Statement

# 13.18.1. Sworn Statement SECTION 287.133 (3) (a)\*

I have read and attest that I understand that a "public entity crime" as defined in Paragraph 287.133 (1)(g), Florida Statutes (current version), means a violation of any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

I have read and attest that I understand that "convicted" or "conviction" as defined in Paragraph 287.133 (1)(b), Florida Statutes (current version), means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any Federal or State trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

I have read and attest that I understand that an "affiliate" as defined in Paragraph 287.133 (1)(a), Florida Statutes (current version), 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 (1) person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one (1) 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.

I have read and attest that I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes (current version), means any natural person or entity organized under the laws of any state or

of the United States with the legal power to enter into a binding contract and which proposals or applies to proposal on contracts for the provisions of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

I have read and attest that based on information and belief, the statement which I have confirmed below is true in relation to the entity submitting this sworn statement: [attach a copy of the final order]. I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH ONE (1) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31, OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT. M Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. ☐ The entity submitting this sworn statement, or one (1) or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. ☐ The entity submitting this sworn statement, or one (1) or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing

#### \*Response required

#### 13.18.2. If you choose option 3, please attach a copy of the final order

statement on the convicted vendor list [attach a copy of the final order].

Officer determined that it was not in the public interest to place the entity submitting this sworn

The entity submitting this sworn statement, or one (1) or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted Vendor/Contractor list

#### Please attach a copy of the final order

Please attach your W-9

# 13.19. Authorized Signatures/Negotiators

# 13.19.1. Authorized Signatures/Negotiators \*

Please provide the information to support the statement below:

The Vendor/Contractor represents that the following persons are authorized to sign and/or negotiate contracts and related documents to which the Vendor/Contractor will be duly bound:

Name(s) J. Corbett Alday
Title(s) Vice President & COO
Phone no (s) (352)-437-3902
*Response required
13.19.2. Type of Organization *
Select your organization's type below
☐ Sole Proprietorship
☐ Joint Venture
▼ Corporation
☐ Partnership
*Response required
13.19.3. Company ID*
Please Provide Your:
Company name Guardian Community Resource Management, Inc.
Address 3020 Bruton Rd. Plant City, FL 33565
Phone (352)-437-3902
Email christine@guardiancrm.com
State of Incorporation and Florida
Federal I.D. NO. 13-4309252
Please state if you collect Florida sales Tax. No
*Response required
13.19.4. W-9*

# (Rev. October 2018) Department of the Treasury Internal Revenue Service

# Request for Taxpayer Identification Number and Certification

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

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

	1 Name (as shown on your income tax return). Name is required on this line; do	not leave this line blank.		
	Guardian Community Resource Man, Inc.			
	2 Business name/disregarded entity name, if different from above			
page 3	3 Check appropriate box for federal tax classification of the person whose name following seven boxes.	e is entered on line 1. Check only	y one of the	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
e on	Individual/sole proprietor or C Corporation Single-member LLC	Partnership T	rust/estate	Exempt payee code (if any)
ğ ğ	Limited liability company. Enter the tax classification (C=C corporation, S=	S corporation, P=Partnership)		
Print or type. See Specific Instructions on page	Note: Check the appropriate box in the line above for the tax classification LLC if the LLC is classified as a single-member LLC that is disregarded fro another LLC that is not disregarded from the owner for U.S. federal tax pul is disregarded from the owner should check the appropriate box for the tax	m the owner unless the owner or rposes. Otherwise, a single-men	f the LLC is	Exemption from FATCA reporting code (if any)
i i	Other (see instructions)			(Applies to accounts maintained outside the U.S.)
Sp	5 Address (number, street, and apt. or suite no.) See instructions.	Reque	ester's name a	and address (optional)
ge	3020 Bruton Road			
0,	6 City, state, and ZIP code			
	Plant City, FL 33565			
ſ	7 List account number(s) here (optional)			
Par			T	
	our TIN in the appropriate box. The TIN provided must match the name p withholding. For individuals, this is generally your social security num		Social sec	curity number
	nt alien, sole proprietor, or disregarded entity, see the instructions for P			-     -
entities	s, it is your employer identification number (EIN). If you do not have a n			
TIN, la		Alas ass Mbat Nama and	Or Employer	identification number
	If the account is in more than one name, see the instructions for line 1. er To Give the Requester for guidelines on whose number to enter.	Also see vvnat ivame and	Lilipioyei	Tuerran cattor namber
	7, 10 and the residence of the second of the		1 3	-4 3 0 9 2 5 2
Parl	II Certification			
	penalties of perjury, I certify that:			
	number shown on this form is my correct taxpayer identification numb	er (or I am waiting for a num	ber to be iss	sued to me); and
Sen	not subject to backup withholding because: (a) I am exempt from back vice (IRS) that I am subject to backup withholding as a result of a failure onger subject to backup withholding; and	kup withholding, or (b) I have to report all interest or divide	e not been n dends, or (c)	otified by the Internal Revenue the IRS has notified me that I am
3. I am	a U.S. citizen or other U.S. person (defined below); and	Ti .		
	FATCA code(s) entered on this form (if any) indicating that I am exemp	t from FATCA reporting is co	orrect.	
you ha	cation instructions. You must cross out item 2 above if you have been no ve failed to report all interest and dividends on your tax return. For real esta ition or abandonment of secured property, cancellation of debt, contribution han interest and dividends, you are not required to sign the certification, but	ate transactions, item 2 does ons to an individual retirement	not apply. Fo arrangemen	or mortgage interest paid, t (IRA), and generally, payments
Sign Here	Signature of U.S. person > Intime & Aldey	Date ▶	July 28	, 2023
Ger	neral Instructions	• Form 1099-DIV (dividend funds)	ls, including	those from stocks or mutual
Section noted.	n references are to the Internal Revenue Code unless otherwise	• Form 1099-MISC (variou proceeds)	s types of ir	ncome, prizes, awards, or gross
related	e developments. For the latest information about developments I to Form W-9 and its instructions, such as legislation enacted ney were published, go to www.irs.gov/FormW9.	Form 1099-B (stock or n transactions by brokers)	nutual fund s	sales and certain other
		• Form 1099-S (proceeds	from real es	tate transactions)
Pur	pose of Form	,		rd party network transactions)
inform	ividual or entity (Form W-9 requester) who is required to file an ation return with the IRS must obtain your correct taxpayer	<ul> <li>Form 1098 (home mortg. 1098-T (tuition)</li> </ul>	age interest)	, 1098-E (student loan interest),
(SSNI)	ication number (TIN) which may be your social security number individual taxpayer identification number (ITIN), adoption	• Form 1099-C (canceled	•	
taxpay	er identification number (ATIN), or employer identification number	Form 1099-A (acquisition		
(EIN), 1	to report on an information return the amount paid to you, or other nt reportable on an information return. Examples of information	alien), to provide your corr	ect TIN.	person (including a resident
	s include, but are not limited to, the following. n 1099-INT (interest earned or paid)			requester with a TIN, you might What is backup withholding,

later.

# State of Florida

# Woman Business Certification

Guardian CRM, Inc.

Is certified under the provisions of 287 and 295.187, Florida Statutes, for a period from:

05/12/2023

to

05/12/2025

J. Todd Inman
Florida Department of Management Services



Office of Supplier Diversity 4050 Esplanade Way, Suite 380 Tallahassee, FL 32399 850-487-0915 www.dms.myflorida.com/osd

# ADDENDUM # TWO (2)

# TO THE CONTRACT DOCUMENTS FOR THE

# Community Development Block Grant (CDBG) Grant Administration FFY2021/2022

IN HERNANDO COUNTY, FLORIDA

SOLICITATION NO. 23-RFPG00380/FH

BIDS DUE: 07/31/2023 BY 10:00 AM EST

Bidders are required to acknowledge receipt of this Addendum via OpenGov prior to the time of the Bid Opening.

The following changes, additions and/or deletions are hereby made a part of the Contract Documents for the above-referenced Solicitation as fully and completely as if the same were fully set forth therein:

#### A. QUESTIONS AND ANSWERS

- 1.Q. The language in the section below references REO homes. CDBG HR does not address REO homes. Eligible homes must be owner-occupied. Please advise if there are special circumstances under which you intend to address REO homes, and provide documentation that FDEO has approved this strategy:

  "13.17.3. TAB 3 Resume/Staff Qualifications\* Identify staff to be assigned to the County's projects; provide detailed resumes including only practical, 'hands-on' experience. Hands-on experience with different aspects of single-family property REO's (Real Estate Owned)....."
- 1.A. Hernando County's CDBG Housing Rehab grant award will not address REO homes. If the Vendor has experience with REO's this may be included to show other related experience.

BOARD OF COUNTY COMMISSIONERS OF HERNANDO COUNTY, FLORIDA

For: Toni Brady, Chief Procurement Officer

Addendum # 2 Page 1 of 1

# 11. PRICING PROPOSAL

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1	Agreement Administration Fees - • Representation during site visits • and monitoring visits • Oversight of project schedule and compliance • Coordination with other agencies and contracts • Develop and process amendments • Provide regular project status reports • Provide all other necessary technical assistance • Develop project information management & filing system • Develop work plan for project contract document • Oversight of citizen complaint process	1	EA		
2	PROJECT DELIVERY SERVICES: • Review of project contract document • Review bid documents for compliance • Conduct and attend preconstruction conference • Monitor contractor performance and compliance • Environmental review • Request wage decisions • Review contract documents	1	EA		\$47,520

ine Item	Description	Quantity	Unit of Measure	Unit Cost	Total
3	FINANCIAL ADMINISTRATION: • Develop project financial management system for receiving/disbursing funds • Supervision of payment authorizations • Maintain project account records • Monitor all project activity to ensure compliance • Develop budget for project contract • Budget tracking • Review change orders for compliance • Review amendments for compliance	1	EA		
4	POST-PROJECT ACTIVITIES: • Review final change order and pay request • Gather all necessary supporting documents • Prepare documents for administrative/financial close out • Balance final project budget • Review final constr. doc • Final status report	1	EA		\$9,300
OTAL					\$90,000

51

# \*Response required

# 13.19.5. REQUIRED GRANT FORMS

- Prime-Certification Regardi...
- DBE-SUB Statement Form.pdf
- GOOD FAITH EFFORTS-with OSD...
- Certification for Disclosur...
- Exp 2-18-2025 Standard Form...
- HC Employment Disclosure St...



July 28, 2023

Hernando County Board of County Commissioners Erin Kluis Briggs, Grant Writer 15470 Flight Path Drive Brooksville, FL 34604 (352) 754-4778 ebriggs@co.hernando.fl.us

Dear Ms. Briggs and Selection Commission Members:

Guardian Community Resource Management Inc. (Guardian) is a full-service grant management firm incorporated in the State of Florida since 2005 and continuing to serve local governments throughout the state. As an industry leader, we are here to help you meet the increasing needs for improved affordable local infrastructure, economic development, housing, disaster recovery, utility financing, and the creation of high wage jobs in your community.

Guardian has over 150 years of combined team experience, and is a leader in grant research, planning, writing/application, and program administration services for federal and state-initiated programs such as **Small Cities CDBG**, State Housing Initiative Partnership (SHIP), Economic Development, Public Works, and State Revolving Fund, among others. We believe our ongoing involvement in similar communities involving federal and state grant program administration, and our intimate familiarity with the complexities of Federal and State regulations, especially those under HUD, makes us the best qualified firm to fulfill your needs. We have worked in cities, counties, and special districts throughout Florida. In short, when you are talking about overall experience from application to implementation of state and federal grant funded programs, you will not find a more experienced knowledgeable, dedicated, and ethical team than Guardian.

In 2009, Guardian began working for Hernando County organizing and providing program administration and project delivery services for NSP1 funds to be used as financing mechanisms for REO property purchases, REO-LMMI direct purchase assistance, acquisition housing rehabilitation and VLI rental housing. Guardian moved forward with Hernando, providing services for another NSP project as well as various CDBG Housing and Neighborhood projects throughout the years. The Guardian team continues to provide grant planning/application & program administration, contract prep & implementation, conducted household surveys, project inspections and financial management.

Based on our record with federal and state government funded projects, please know that when it comes to working with the Hernando County team, we will always respond professionally, and in a timely manner. We will act in the best interest of your community, without overstepping our responsibilities. We will provide you and your residents with the highest quality standards and service that make Guardian a leader in this industry.

At Guardian, we feel providing the **maximum accessibility** and **on-site capability** is critical to the successful management and completion of a project. **Because our team members live locally to our clients and work remotely**, they often work outside normal office hours and make every effort to respond to your calls or requests within 24 hours. Allowing our team to be completely mobile means we can go where the project needs attention, as well as interface regularly with the client.

Our office is staffed with full-time office professionals that provide support for our clients and for our other team members. The office is equipped with all the major technological equipment, including scanners, copiers, computers, servers, and more. All Guardian team members are technically connected to serve our clients in the field with; Encrypted flash drives, available for client privacy/protection, and portable printers and access to Guardian's **backup servers** to ensure all documentation is secure and maintained in accordance with all public records requirements.

We have successfully written and completed over 200 projects, totaling \$500,000,000+ in grants, loans, and private investment (the mixing, matching, and leveraging of multiple funding sources), with the majority involving CDBG, SHIP, FEMA PA, SRF, NSP, HOME, Disaster Recovery, EDA, and other community and economic development programs.

The Guardian Team encourages you to contact our references and confirm that when you partner with our firm, you get a team that is responsive, technically knowledgeable and committed to your success. We are local, housed in Dade City, Florida, with exclusive experience with housing, neighborhood, commercial revitalization, economic development, and Florida disaster recovery.

It is our pleasure to offer our continued services to Hernando County. This proposal is a firm offer of services and is irrevocable for a period not to exceed one hundred and eighty (180) days from the public opening date and time. I am the duly authorized representative to negotiate and legally bind Guardian in a contract, and I understand and agree to be bound by the terms and conditions of the RFP and addendums as presented. I certify that no lobbying of any Selection Commission members or the Employees of the County has taken place and professional silence concerning the RFP has been maintained during the RFP process. Further, I declare that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to the RFP.

Please do not hesitate to contact me should you have any questions or require additional information. We look forward to the opportunity to serve you and your community.

Sincerely,

J. Corbett Alday
President & COO
15000 Citrus Country Drive, Suite 331
Dade City, FL 33523
352-437-3902
Corbett.alday@guardiancrm.com



# **Organization Profile and Capacity**

Guardian Community Resource Management Inc. (Guardian) is a full-service grant management firm established in 2005 as a for-profit, S Corporation, and is a State of Florida Certified Minority/Women Owned Business. The Guardian Team is comprised of nine (9) veteran grant and management professionals. Our Team brings to your organization over 150+ years of combined expertise and handson experience working in the various areas of state and federal grants and loan-funded community development and affordable housing.

Our office is located at 15000 Citrus Country Drive, Suite 331, Dade County, FL 33523. Our office phone number is 352-437-3902, Toll Free 888-482-7393.













Each professional team member assigned to your projects:

- Holds a post-secondary degree, certification, or professional license.
- Years of experience working in the public sector yielding unique insight into knowing the level of quality, customer service & performance expected from our clients.
- Is dedicated to the success of all our clients' projects.

# Ready to Proceed and Ready to Serve!

All Guardian team members are technically connected to serve our clients in the field with:

- Fully equipped laptops and wireless broadband internet access in addition to the full suite of Office products and other standard software,
- Encrypted flash drives available for client privacy and protection, a cellular phone, limited office supplies, and where needed portable printers.
- Access to Guardian's backup servers to ensure all documentation is maintained in accordance with all public records requirements.
- Toll free phone number accessible to not only Guardian clients but to all individuals, contractors and vendors that may be requesting assistance through the local governments and or agencies.

From its inception, the Guardian Team has worked **for local governments** to develop and provide grant research, planning, grant application preparation, leverage strategies, program administration and management and construction oversight services.

# Our full-service grant management includes, but is not limited to:

- Grant research, project planning, grant application writing, planning, & budgeting new prog.
- o Developing grant funding/leveraging strategies, including loans/layering of other funds.
- o Preparing HUD and NEPA Environmental Reviews (ERR) at all levels.
- o Reviewing/updating various local grant related policies/procedures as required.
- o Preparing Request for Funds, invoices, & approvals for expenditures.
- o Establishing necessary policy and procedures, best practice client and administration files.
- o Fiscal management of all funds, including match, leverage, change orders, pay requests.
- o Preparing RFP for procurement of contractors, engineers, vetting, bid invitations.
- o Attending pre-bid conference, bid opening/pre-construction meeting, developing contracts.
- Assisting in/ preparing for required Fair Housing activities; preparing grant amendments, monthly, quarterly, close out reports & other funder reports.
- Construction oversight/inspections, including Davis Bacon, Section 3, MBE/WBE reporting, including write-ups, construction cost estimates, and project management.
- o Identify & respond to potential conflicts of interests/community concerns, as requested.
- Attendance at monitoring, site visits, County Commission, and community meetings; and preparation of responses to any public requests or concerns.
- o Monitor & provide tech assistance through selection of partners, developers, & engineers.



# Financial Responsibility

We understand the most critical aspect of successfully implementing a grant-funded program is ALWAYS being able to follow the money! Guardian professionals have worked throughout the state of Florida, on hundreds of publicly funded projects using every major federal and state funding source, including, CDBG, USDA, FDEP, EDA, TIF, CHWIP, SRF, 108 loans, NSP, HOME, SHIP, FEMA Disaster Prevention (mitigation, preparedness, and recovery), Water Management District funding and private funds.

Of equal importance is Guardian's unique team expertise in **layering multiple funding sources**, which include, but are not limited to: Economic Development Administration Grants, USDA Rural Development Grants and Low-Interest Loans, Department of Environmental Protection Grants and Low-Interest Loans, and other applicable grant and low-interest loan funds through the Federal, State, or other public sources, which may be applicable to County's project(s). These various resources decrease the cost of programs to the local community.



# Location and On-Site Capability

At Guardian, we feel providing the maximum accessibility and on-site capability is critical to the successful management and completion of a project. Because our team members live locally to our clients and work remotely, they often work outside normal office hours and make every effort to respond to your calls or requests within 24 hours. Allowing our team to be completely mobile means we can go where the project needs attention, as well as interface regularly with the client.



# Experience with HUD and other federal and state Agencies.

We have worked with every Federal, especially HUD, and State funded sources and know their criteria to match your community and infrastructure needs. We have monitored and overseen dozens of sub-recipients as part of our CDBG, EDA, USDA, TIF, SRF, OTTED, NSP, HOME, SHIP, FEMA Disaster, private leverage and multiple other grant and loan-funded project management, including rate negotiations.



Corbett Alday, COO, has extensive HUD experience and training on completing environmental reviews. Our Team has received praise from State agencies on the completeness and accuracy of the environmental reviews we have prepared.

- We develop Tier Two Checklists, FONSI notices, and Floodplain Management Plans.
- We draft notices, letters, and sample maps ready for your review and submittal to the funding agencies.
- Complete statutory checklist and respond to any comments.

Our team has extensive experience with funding-agency contracts and managing and tracking all manner of grants and loan-funded project dollars.

For every project, the Guardian team:

- Sets up a duplicate comprehensive program budget and regularly reconciles our numbers with yours.
- Sets up uniform checklists and forms for vendors, stakeholders, and Section 3 and MBE participants.
- Reviews all pay requests and change orders for accuracy and appropriateness.
- Drafts all Federal, State, or private funding and reporting agency reports for staff review.
- Sets up your filing system and regularly self-monitors it for completeness.

• T.A. with and understand the reporting requirements imposed by Federal and State agencies and in turn the requirements they impose on local governments.

Equally important in ensuring that the County is in the best position to successfully apply and qualify for future grants:

- We meet with your County Staff, elected officials, department directors and other stakeholders to discuss immediate concerns and priorities.
- We research potential Federal, State, and private leverage resources and provide recommendations for potential financial match and their requirements, allowing you to evaluate match opportunities.
- We develop all manner of policies and procedures related to implementation of grant and loanfunded programs, including all processes, grant policy, procedure guidelines, W/MBE, Section 3, URA guidelines, and many more.
- We develop public notices, RFPs, agreements, policies, and other grant-related documents.
- We will develop a step-by-step Task Plan that allows us to work in partnership with your staff and maximize your resources and partners.
- We represent you at public and Commission meetings when needed or requested.
- We utilize existing relationships with vendors, contractors, lenders, title search companies, realtors and many others serving your area.
- We provide a one-stop toll-free number dedicated to our clients and businesses.
- We work with myriad Federal and State funding sources to create and administer grant, developer, subrecipient and construction agreements.
- We cover every facet of grant and loan-funded applications, administration and implementation with checklist and trading.
- We provide draft forms and field experience to document all funding requirements, from environmental review to intake to construction to closeout.
- We provide successful strategies for meeting milestones and objectives.
- We draft bid grant specs and guide advertising for and vetting contractors and vendors in the best interest of our communities.
- We provide contract requirement guidelines established for pre-construction meetings and will provide technical training for the contractor(s) and their subs.
- We provide the Project Engineer and/or Architect with an electronic version of a standard document guide, supplemental conditions for specific grant & include the Wage Decision(s) for the project, as applicable.
- We develop quality inspection records and progress reports for immediate review.



# **KEY TEAM MEMBERS PERFORMING WORK UNDER AWARD**



The Guardian team brings to Hernando County extensive experience in the planning, application, program administration, and compliance of Federal and State funded grant and loan-funded programs, including CDBG & SHIP. When you engage the Guardian team, we commit to being on site with you as often as is required. We understand the importance of face-to-face time, and we take it very seriously. Key industry professionals own and manage the business as well as serve your projects directly.

Christine Alday President/CEO	Will provide overall project financial tracking & review, oversight, and controls for funding, & contract review.	<ul> <li>Over 21 years of audit, accounting, &amp; fiscal management</li> <li>15 yrs. grants consulting, program administration.</li> </ul>
Corbett Alday Vice President/COO	Will provide experience in environmental review, research, grant application, implementation & management of federal & state prog.	<ul> <li>27+ years of grants consulting and program admin/experience.</li> <li>130+ projects, and Economic Development of 2,500 jobs.</li> <li>Creative layering expertise</li> <li>Engineering background</li> <li>ENVRR Specialist</li> </ul>
Don Ridley Licensed Building Inspector Director of Construction Administration	Will provide technical assistance in relation to all construction development programs.	<ul> <li>36+ years of construction exper.</li> <li>with seven major disaster events</li> <li>100+ infrastructure jobs</li> <li>2,500+ housing units</li> </ul>
Antonio Jenkins Project Manager/Housing Specialist	Will provide inspections, work-write-ups, bid documents, NTB, and NTP. Create/track project constr. budget, monitor, approves construction/contractor pay.	<ul> <li>14+ years of extensive operations/project experience.</li> <li>1,000+ housing units</li> <li>Well versed in building standards</li> <li>Oversees CDBG/SHIP/NSP rehab/new construction projects.</li> </ul>
Jean Rags Project Coordinator/Technical Advisor	Will provide review of grant application. Local polices/procedures and funder requirements.	<ul> <li>21+ years of government and federal and state grants.</li> <li>Implement/manage CDBG housing projects in local govt.</li> </ul>
Gayle Brett-Sub Consultant Program Specialist	Will provide grant research & prep, state government expertise & insight, review grant docs. Property review & acquisition exper.	<ul> <li>26+yrs working for FDEO &amp; FDEP</li> <li>Years of experience in buying, selling/managing real estate transactions for the State, counties, cities &amp; private sector.</li> </ul>
Marina Edwards Program Manager	Will maintain records, notices, meeting materials, conduct on-site file maint. Prepares/processes environmental reviews.	<ul> <li>7 years direct grant experience</li> <li>Years of non-profit work in housing rehabilitation and new build experience.</li> </ul>
Dawn Cobb Grants Administrator	Assist applicants, tracks all forms of verification. Reviews budgets/ financial plans for accuracy and appropriateness.	<ul> <li>18 years' experience with local government recipients</li> <li>9 years' experience as a Housing Program Coordinator</li> </ul>
Eliana Alday Grants Assistant	Applicant appointment scheduling, maintains server & client files.	Intern training on SHIP/CDBG compliance and administration



The Guardian Team has been successful in maintaining numerous repeat clients, continuing to bid competitively, and keeping client satisfaction and quality service at the forefront of our practice. Guardian's projected workload for the next 24 – 36 months consists of 12-14 clients and 15-17 grant projects, not including any programs we might administer on behalf of your community. The Guardian Team will dedicate ample resources to your projects, including acquiring additional office space and staff as needed.

The following presents a summary workload for the Guardian team:

City of Avon Park CDBG Housing Rehabilitation  City of Avon Park CDBG Mitigation Fire Station  City of Avon Park CDBG Mitigation Water System  Citrus County DRI CDBG Housing Demo/Replace  Citrus County CDBG Economic Development  Columbia County CDBG Economic D Truck Stop  Columbia County CDBG DRI Paving and Drainage  Columbia County CDBG DRI Road/Paving/Drainage  Columbia County CDBG Housing Rehabilitation  Desoto County CDBG Environmental Review  100% complete	
City of Avon Park CDBG Mitigation Water System Citrus County DRI CDBG Housing Demo/Replace Citrus County CDBG Economic Development Columbia County CDBG Economic D Truck Stop Columbia County CDBG DRI Paving and Drainage Columbia County CDBG DRI Road/Paving/Drainage New Columbia County CDBG Housing Rehabilitation New	
Citrus County DRI CDBG Housing Demo/Replace 50% complete Citrus County CDBG Economic Development 10% complete Columbia County CDBG Economic D Truck Stop 10% complete Columbia County CDBG DRI Paving and Drainage New Columbia County CDBG DRI Road/Paving/Drainage New Columbia County CDBG Housing Rehabilitation New	
Citrus County CDBG Economic Development 10% complete Columbia County CDBG Economic D Truck Stop 10% complete Columbia County CDBG DRI Paving and Drainage New Columbia County CDBG DRI Road/Paving/Drainage New Columbia County CDBG Housing Rehabilitation New	
Columbia County CDBG Economic D Truck Stop  Columbia County CDBG DRI Paving and Drainage  Columbia County CDBG DRI Road/Paving/Drainage  Columbia County CDBG Housing Rehabilitation  New	
Columbia County CDBG DRI Paving and Drainage New Columbia County CDBG DRI Road/Paving/Drainage New Columbia County CDBG Housing Rehabilitation New	
Columbia County CDBG DRI Road/Paving/Drainage New Columbia County CDBG Housing Rehabilitation New	
Columbia County CDBG Housing Rehabilitation New	
Desoto County CDBG Environmental Review 100% complete	
Hendry County CDBG Housing Rehabilitation 100% complete	
Hendry County SHIP Housing Ongoing by Task Order	
Hernando County CDBG Housing Rehabilitation 100% complete	
Indian River County CDBG Housing Rehabilitation 90% complete	
Indian River County SHIP Housing Ongoing by Task Order	
City of LaBelle CDBG Neighborhood Revitalization 100% complete	
Town of Lake Placid Rural Infrastructure Fund New	
Town of Lake Placid Legislative Project New	
Town of Lake Placid State Revolving Fund New	
Town of Lake Placid CDBG Commercial Rev. New	
Martin County CDBG Housing Rehabilitation 100% complete	
Martin County SHIP Housing Ongoing by Task Order	
Osceola County Environmental Review 10% complete work order	
City of Palm Coast Entitlement Housing 2020-100% complete, 2021 99% complete New	2022 -
City of Palmetto CDBG Economic Development 10% complete	
Putnam County SHIP Housing Ongoing by Funding Year	
City of Sebastian Entitlement CDBG Ongoing by Funding Year	
Sebring Airport FEMA Technical Assistance Ongoing	
Spring Lake Improvement District Sewer Mains 90% complete	
Spring Lake Improvements District Water Plants New	
City of Stuart CDBG Housing Application New	
Taylor County CDBG Housing Application New	
City of New Port Richey CDBG Housing Application New	
Columbia County ARPA Emergency Assistance New	
City of St. Augustine CDBG-CV New	
City of Stuart CDBG-CV New	
City of Lake Worth Beach CDBG-MIT New	
Lee County Entitlement CDBG New	



# Christine Alday, President and CEO

Ms. Alday is the owner and President of Guardian Community Resource Management, Inc. She has been working with grants and loan-funded programs since 2005. Her prior experience was working for a private Fortune 500 company as an Accountant and Auditor. Christine has "hands on" financial management experience with federal, state, local and private funding sources. Christine Alday has extensive experience with fundingagency contracts and managing and tracking all manner of grants and loan-funded project dollars and is responsible for the overall financial management of each project.

#### **Education/Certificates**

Masters - Accountancy, Univ. of S. Florida BA, Accounting, Univ. of S. Florida

#### **Professional Assoc.**

President, West Central Florida Chapter, Grant Prof. Association Woman of the Year 2012-2013 by National Assoc. of Prof. Women Fl. League of Cities Fl. Assoc. of Counties Fl. Comm. Dev. Assoc. Fl. Green Bldg. Coalition Amer. Women's Bus. Assoc. Lakeland Chapter

#### Training

NSP, CDBG, SHIP, HOME, USDA, HUD and FDEO Wrkshp/Webinars OIG fraud training CDBG Rule Hearings, Appl. & Imple. Wrkshops Florida in the Sunshine and Ethics Seminar

#### **CDBG Projects**

Lake Placid, City of Labelle, City of Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties, Spring Lake Imprv.Dist.

# Professional highlights and duties:

Ms. Alday develops financial tracking for all grants and loan-funded federal and state projects and ensures accurate financial management. She has over twenty-one (21) years of audit, accounting, and financial management experience, and over fifteen (15) years of grants consulting and program administration experience. She is responsible for contract management, monitoring preparation and managing client relations. She has worked on housing and infrastructure projects totaling more than \$200,000,000 in funding from myriad sources.

- Creates a duplicate project budget and reconciles it regularly with the local government and the funding agency.
- Reviews budgets and financial plans for accuracy and appropriateness.
- Coordinates with client auditors on financial questions related to the grants.
- Conducts a review of all grant close-out packages and provides a balance of project budgets prior to closeout.
- Reviews client procedures/policies as needed, including substantive tests of internal controls, & evaluate internal methodology.



# J. Corbett Alday, Vice President/COO

Mr. Alday's career in public funded projects began over twenty-seven (27) years of grant experience, and over 130+ projects and economic development of 2,500 jobs. He is the lead Project Administrator for all our projects. During his career, he has continued his work with Small Cities CDBG, adding work experience in a vast array of public funding sources. These include: Special Appropriation Disaster Recovery CDBG, Entitlement, HMGP, SHIP, USDA, SRF, FDEP, FDOT, OTTED, EDA, EPA, SWFMD, SRWMD, STAG, Section 108 CDBG, FRDAP, FEMA, HUD, SBA, HHRP, FHFC, NSP, and many others.

#### **Education/Certificates**

Bachelor's Degree in Engineering, Fl. State Univ. AA in Drafting Technology

#### Professional Assoc.

Florida League of Cities Florida Assoc. of Counties Lake County League Cities Florida Comm. Development Association Florida Green Bldg. Coal. Grant Professionals Association

#### **Training**

Webinar
Green Bldg. Training Ser.
HUD/ENVRR/RROF tr.
Storm Water Utility Rate,
Planning, Utility Develp. &
Fin. Courses
FEMA HMGP/FMGP TS
CDBG Rule Hearings, Appl. &
Impl Wkshops, CDBG Sect
108 Wkshop.
Florida Sunshine/Ethics
GIS for Comm. Dev Prof.

#### **CDBG Projects**

Lake Placid, City of Labelle, Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties, Spring Lake. Imprvmt. Dist. Gateway District, Sebring, Sebring Airport.

# Professional highlights and duties:

Mr. Alday is the leading expert in the State in the area of creative layering – the linking of multiple funding sources. For hundreds of projects, he has helped communities match sound technical solutions with the special restrictions of grant-loan programs.

Mr. Alday has experience working in over fifty (50) communities in excess of twenty (20) different sources of funding totaling more than \$500 million!

Mr. Alday has extensive project management experience from grant writing to implementation to close out. He has successfully implemented HUD's Environmental Review Record (ENVRR) requirements on numerous projects.

- Conducts grant-loan funding research and performs site investigations & preliminary scoring to determine community needs and grant funding feasibility.
- Conducts needs analysis, grant research and prepares draft application writing.
- Develops layering recommendations and preliminary applications activities.
- Participates in and oversees bid and construction management, Davis Bacon and manages the environmental review processes consistent with NEPA requirements.
- Serves as Project Manager on this RFP.



# Donald M. Ridley, Construction Manager/Technical Support

Mr. Ridley brings over thirty-six (36) years of grant experience and 2,500 housing units completed including construction oversight experience to our team of seven (7) declared disaster events. Mr. Ridley is experienced in FEMA disaster recovery programs, including all forms, policies and procedures related to disaster events i.e. Public Assistance worksheets and HMGP. He is a recognized construction professional in Florida with a wide range of relevant experience: site development, housing, utilities, water and sewer plants, power plants, earthwork, foundations, concrete, masonry, steel, welding, painting and roadway construction. Don provides technical assistance to all construction development projects.

#### **Education/Certificates**

Business Education from Jones Business College State Licensed Standard Inspector, BN-0001431 Certified SBCCI Housing Rehabilitation Certified SBCCI Bldg. ACI, NICET, FI DBPR Lic ICC and BOCAI Inspector

#### **Professional Assoc.**

Florida League of Cities Florida Assoc. of Counties Lake County Lg. of Cities FL Comm. Develp. Assoc. Osceola Grants Res. Network International Code Council

#### **Training**

FDEO NSP TA Training
HUD ENVRR & RROF Tr.
US HUD Envrr. Review Proc.
My Safe Fl. Home Inspector
FL Bldg. Code Advanced Building Structural Summary
Inter Codes 2: Occp & Loads
FL Building Code Advd.
Resid-Floors, Walls/Roofs
FL Building Code Advd. -IEQ
ADA Guidelines: Access. Rt.

# CDBG Projects All open projects

# Professional highlights and duties:

Mr. Ridley is well versed in permit and grants regulatory issues and understands the special restrictions of public grant-loan funded projects. Mr. Ridley is highly experienced in construction plans review, time management and cost control.

In addition, Mr. Ridley has worked with more than one-third of the Florida counties and municipalities as well as many leading engineering and construction firms. He has extensive experience with post-disaster redevelopment issues and has managed and inspected development projects for streets, downtown, water and sewer works totaling over \$300,000,000.

- Participates in site inspections & investigations, field verification of quantities and adherence to project specifications.
- Participates in on-site compliance monitoring, for regulations related to Davis Bacon, Section 3, Copeland "Anti-kickback" Act, W/MBE and others.
- Participates in project development and implementation; oversight in bid and construction management, and review of environmental issues.



# Antonio Jenkins, Specialist Project/Construction Manager

Mr. Jenkins has over fourteen (14) years of extensive operations and project coordination experience in over 1,000 housing units and is well versed in the latest building standards and codes. Antonio manages the construction administration and project representation for our land development and housing programs, including CDBG, NSP, SHIP, HOME, and others. Additionally, Mr. Jenkins has an extensive background in social and operations management which enables him to provide excellent client customer service and serves as an invaluable asset in the-field and when face-to-face time is required with clients.

# **Education/Certificates**

Bachelor's Degree in Political Science, Valdosta State University Certified Inspector My Safe Florida Home Florida Green Home Designation Certification

#### **Professional Assoc.**

Florida League of Cities Florida Assoc. of Counties Lake County Lg. of Cities FL Comm. Develop. Assoc. Fl. Green Bldg. Coalition

#### **Training**

NSP / CDBG / SHIP / HOME / USDA / HUD / FDEO Workshops and Webinars Lake & Volusia County 2011 Annual Green Symposium **HUD** Section 3 training Issues/Challenges of Owner-Occupied Rehab FDEO NSP TA Training HUD ENVRR & RROF Tr. Green Building Tr. Series CDBG Rule Hearings, Appl / Impl. Wkshops U.S. HUD Envrr. Review My Safe FL Home Inspector

#### **CDBG Projects**

Lake Placid, City of Labelle, City of Palmetto, City Stuart, City Avon Park, City Palm Coast, City Deltona, Columbia, Desoto, Flagler, Hendry, Hernando, Highlands, Indian River, Osceola, Palm Coast, Putnam, Citrus, Indian River, & Martin counties,

# Professional highlights and duties:

Mr. Jenkins' primary duties include project delivery services and construction oversight, including single family homeownership and multi-family homeownership & rental for NSP and for CDBG implementation, in addition to oversight of construction bidding, contractor vetting and program management.

Mr. Jenkins continues to oversee the construction and / or rehabilitation of 1,000+ multi and single-family housing units and the construction oversight of various other grant funded infrastructure projects.

- Conducts orientation sessions for contractors and vendors.
- Conducts site inspections for compliance.
- Reviews/recommends changes to local HAP.
- Conducts HUD Tier 2 Environmental Reviews.
- Reviews mortgage & construction contracts.
- Conducts monitoring of single/ multi-family rental construction.
- Conducts & provides inspections, work-write-ups, bid documents, NTB, and NTP.
- Creates/tracks project construction budget; reviews, monitors, approves construction and contractor pay authorizations.



# Jean Rags, Project Coordinator/Technical Advisor

Ms. Rags has over twenty-three (23) years of government and grants experience. Ms. Rags successfully implemented and managed in excess of \$15 million dollars through Community Development Block Grant (CDBG) projects for seven (7) Housing Rehabilitation and Economic Development projects and the application and implementation of the Neighborhood Stabilization (NSP1 and NSP3) Grant Programs in Hernando County from 1999-2012. Jean conducts grant research and funding resource analysis, drafts local policies and procedures for our clients to meet funder requirements, and reviews / edits contracts and grant related advertisements, memos and documents. Jean also provides marketing and proposal responses on behalf of Guardian.

#### **Education/Certificates**

Bachelor of Arts, Major in Human Services, Minor in Social Services, St. Leo College Associate of Arts, Pasco-Hernando State College NIMS Series ICS100B, ICS200B, ICS007A Certifications

#### Professional Assoc. Notary Public, State of FL

## Training

NSP3 HUD Workshop FDEO
NSP1 TA Training FDEO
E-CDBG training
NSP Implemt. Workshop
CDBG Rule Hearings,
Application/ Implementation
Workshops
FDEO DRGR Webinar Tr.
NSP Workshops/Webinars
FHC Annual Statewide
Affordable Housing
Conference

#### **Projects**

All open and potentially new projects.

# Professional highlights and duties:

Prior to joining Guardian in 2012, Ms. Rags was the Director for Community Development in Hernando County, where she was responsible for the oversight and management of numerous County departments in addition to CDBG & NSP programs totally \$15 million.

- Reviews & edits all contracts, policies, amendments & grant documents, prior to submission.
- Markets and develops proposals in response to open RFP, RFQ, and RFI's.
- Participates with attendance and representation as needed at client offices, public meetings.
- Provides development and review of grant management policies and procedures.
- Develops grant required documents, (e.g. Housing Assist. Plans, policies & procedures.
- Assist in monthly client billing review, calculations and invoicing as needed.



# Gayle Brett, Sub-Consultant / Program Specialist

Ms. Brett has 20+ years of government, grants and real estate experience working in both the private sector and also for the State of Florida in various state and federal programs. Previously, she worked for Fl. Depart. of Economic Opportunity (FDEO) Housing and Community Development Section with the NSP & CDBG programs and also in Florida Communities Trust (FCT), a land buying program that received \$66 million per year to assist cities and counties in purchasing property, negotiating, contracting/ closing as needed. Ms. Brett has eight (8) years of employment in private sector real estate, and previously held both a Real Estate Sales Associate and Broker license. Ms. Brett is responsible for providing program administration for NSP1, NSP3, CDBG & SHIP programs in Osceola, Martin, Flagler, Putnam, Hernando counties and others.

#### **Education/Certificates**

Davis Productivity Award as part of the team that implemented State of Florida's NSP 1 award

#### Professional Assoc.

Florida Real Estate Sales License Tallahassee Board of Realtors ® Natl. Assoc. of Realtors ®

#### Training

SHIP Prog. Admin. Webinar **HUD Prog Income & NSP** Admin. Strategies HUD NSP Closeout Webinar Annual CDBG Tr. Workshop NSP 3 Appl/ Impl. Workshop HUD Tr. Web-NSP1 & 3 HUD Fair Housing Training National Right-of-Way Assoc: Leadership Skills for Real Property Prof Intro.to Prop. Mgmt., Real Prop. Asset Mgmt./Surv Fl. Real Estate Assoc. & Broker Licensing (not lic.) FDEO e-CDBG Webinar HUD **DRGR Stand Reports** Webinar Conference

#### **CDBG Projects**

City Palm Coast; Indian River, Martin, Osceola County

# Professional highlights and duties:

Prior to joining Guardian in 2012, Ms. Brett worked with FDEO's Housing and Community Development department in the oversight and implementation of the state's NSP Program.

She also worked with the FDEP; Division of State Lands, in the Conservation and Recreation Lands Program, Preservation 2000 and Florida Forever Programs.

Ms. Brett's career has been built on good communication skills and bringing her real estate expertise into streamlining the state government land buying, selling and management practices.

- Reviews and edits all real estate contracts, appraisals, title insurance commitments, policies, closing statements, documents and mortgages.
- Communicates with real estate agents, brokers, banks and appraisers to better assist our clients in maintaining grant compliance.
- Attends public meetings/hearings and conducts grant compliance monitoring.
- Develops grant required documents.
- Reviews/edits drafts of required agency reports: MSR, MBE, Section 3, quarterly status reports and other grant related reports.
- Research, preparation and processing of SHIP payoffs and Satisfactions



# Marina Edwards, Program Manager

Ms. Edwards' experience with applicants for non-profit programs has been invaluable as she coordinates all of Guardian's Applicant intake for local government recipients. She has been working withgrants since 2016. Her prior experience was working for non-profit organizations as Development Director and Community Relations Director. Marina has experience with federal and state, grant regulations and requirements and remains current with all new CDBG and SHIP housing trainings and webinars. She has advance technology skills and is proficient with all Microsoft software and other related system programs and applications, server maintenance, and all office related technologies.

#### **Education/Certificates**

Minster College – United Kingdom – BTEC City and Guilds diploma in Art & Design

**Professional Assoc.**National Notary Association

#### Training

Habitat for Humanity Mortgage and Homeownership Training

**CCTCP Training** 

Various grant writing workshops

HUD Environmental Review Procedures

SHIP Intake/Report Training

#### **CDBG/SHIP Projects**

Putnam County SHIP Hendry County SHIP/CDBG Martin County SHIP/CDBG Citrus County CDBG City of Avon Park CDBG City of Sebastian CDBG Osceola County CDBG Columbia County CDBG/ARPA City of New Port Richey CDBG Taylor County CDBG City of Stuart CDBG Town of Lake Placid CDBG Desoto County CDBG Indian River County CDBG/SHIP City of St. Cloud CDBG City of St. Augustine CDBG City of Lake Worth Beach CDBG

# Professional highlights and duties:

Ms. Edwards is responsible for the review, vet, creation, and management of all client related files including contractors, subcontractors, homeowners, homebuyers, renters. She is responsible for the maintaining of records, preparing public notices, materials for meetings, and conducts on-site file maintenance, prepares and processes environmental reviews.

She provides support and assistance to all team members daily and assists in the management of administrative project requirements to maintain efficient records/reports and timely responses.

- Assists with tracking project statistics and applicant demographic information.
- Oversees the review of individual/household applications to determine eligibility.
- Reviews clients grant administrative files to ensure those files are complete and audit ready.
- Assists with all grant reporting, based on applicable grant requirements, including Fair Housing, Civil Rights, MBE & Section 3.
- Prepares and processes environmental review records and coordinates with agencies and Tribes for consultations
- Prepares documentation for Request for Release of Funds on behalf of clients
- Prepares documentation for modifications to subrecipient award agreements on behalf of clients



# Dawn Cobb, Grant Administrator

Ms. Cobb's experience with applicants has been invaluable as she coordinates all of Guardian's Applicant intake for local government recipients. Her prior eighteen (18) years experience was with a local government municipality and the last nine (9) years as their Housing Program Coordinator which overseen all of their housing programs (SHIP, CDBG,NSP and HOME).

# Professional highlights and duties:

# Education/Certificates

Becker College - AA Degree

Certificates: FEMA-MGT470FLestablishing collaborative case management

FEMA-MGT471RX-Executing strategies to rapidly rehabilitate damaged houses

FEMA-IS-00100.C-Incident Command System, ICS-100

FEMA-IS-00700.b-National Incident Management System

Florida Housing Finance-Proficiency in income qualification

#### **Professional Assoc.**

#### Training SHIP/CDBG WORKSHOP

#### CDBG/SHIP Projects

City of Stuart CDBG Columbia County CDBG Columbia County ARPA Putnam County SHIP Martin County SHIP/CDBG Indian River CDBG Ms. Cobb is responsible for all Guardian grant recipients' Applicant screenings, third party verifications and updates for all digital and hard copy applicant files. She ensures that all relevant documentation is acquired from the applicant as per the program requirements.

- Assists applicants with required application and documentation queries.
- Tracks applicant information ensuring all relevant documentation is acquired, and information remains current as per the program requirements.
- Verifies licenses, company status and references for all contractors.
- Compiles and verifies environmental impact reports and studies.
- Reviews budgets and financial plans for accuracy and appropriateness.
- Coordinates with client auditors on financial questions related Conducts a review of all grant close-out packages and provides a balance of project budgets prior to closeout.
- Reviews client procedures/policies as needed, including substantive tests of internal controls, & evaluate internal methodology.



#### Eliana Alday, Grants Assistant

Ms. Alday is our most recent Guardian Team member. She is invaluable in scheduling applicant appointments, maintaining our company server and maintaining applicant files to ensure they are audit ready.

#### Professional highlights and duties:

#### **Education/Certificates**

Geneva Classical Academy

**Professional Assoc.** 

Training SHIP/CDBG WORKSHOP

#### **CDBG/SHIP Projects**

City of Stuart CDBG Columbia County CDBG Columbia County ARPA Putnam County SHIP Hendry County SHIP Taylor County CDBG Ms. Alday is responsible for all Guardian's scheduling, Applicant screenings, third party verifications and updates for all digital and hard copy applicant files. She ensures that all relevant documentation is acquired from the applicant as per the program requirements.

For our publicly funded projects, she:

- Assists applicants with required application and documentation queries.
- Tracks applicant information ensuring all relevant documentation is acquired, and information remains current as per the program requirements.
- Verifies licenses, company status and references for all contractors.
- Reviews client procedures/policies as needed, including substantive tests of internal controls, & evaluate internal methodology.



Client:

Hernando County Board of County Commissioners

15470 Flight Path Drive Brooksville, FL 34604

(352) 754-4000

Contact:

Hernando County Health & Human Services

Veda Ramirez - Manager

621 Jefferson Street Brooksville, FL 34601

(352) 540-4338

vramirez@co.hernando.fl.us

Projects:

**CDBG-Housing Rehabilitation FY2015** 

Housing rehabilitation of 11 units

Awarded June 2017 - Completed June 2021

Project was completed within budget. Due to COVID

impacting the availability of construction materials, a time

extension was requested to complete the projects.



Client: Martin County Board of County Commissioners

435 Southeast Flagler Avenue

Stuart, FL 34996 (772) 419-6932

Contact: Martin County Human Services

Michelle Miller - Human Services Administrator

435 Southeast Flagler Avenue

Stuart, FL 34996 (772) 288-5735

mmiller@martin.fl.us

Projects: CDBG-Housing Rehabilitation FY2017

Housing rehabilitation of 11 units

Awarded September 2017 - completed April 2022

Project was completed within budget. Due to COVID impacting the availability of construction materials, a time

extension was requested to complete the projects.



Client: City of Avon Park

110 E Main Street

Avon Park, FL 33825

(863) 452-4400

Contact: City of Avon Park Finance Department

Melody Sauerhafer – Finance Director

110 E Main Street

Avon Park, FL 33825

(863) 452-4410

msauerhafer@avonpark.city

Projects: CDBG-Housing Rehabilitation FY2017

Housing rehabilitation of 11 units

Awarded December 2018 – anticipated completion

December 2023

Project is within budget. Due to COVID impacting the

availability of construction materials, a time extension was

requested to complete the projects.



Client:

**Indian River Board of County Commissioners** 

1801 27th Street

Vero Beach, FL 32960

(772) 567-8000

Contact:

Indian River Planning Department

Chris Balter - Chief of Long Range Planning

1801 27<sup>th</sup> Street

Vero Beach, FL 32906

(772) 226-1250

cbalter@ircgov.com

Projects:

**CDBG-Housing Rehabilitation FY2017** 

Housing Rehabilitation of 11 units

Awarded December 2018 – anticipated completion January

2023

Project is within budget. Due to COVID impacting the availability of construction materials, a time extension was requested to complete the projects.



Client: Columbia County Board of County Commissioners 135 NE

Hernando Avenue Lake City, FL 32055 (386) 866-4100

Contact: Columbia County Administration

David Kraus - County Manager 135 NE

Hernando Avenue Lake City, FL 32055 (386) 758-1005

David kraus@columbiacountyfla.com

Projects: CDBG- Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client:

City of New Port Richey

5919 Main Street

New Port Richey, FL 34652

(727) 853-1016

Contact:

City of New Port Richey Planning

Lisa Algiere - Senior Planner

5919 Main Street

New Port Richey, FL 34652

(727-853-1050)

AlgiereL@CityofNewPortRichey.org

Projects:

CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client: Taylor County Board of County Commissioners

201 E. Green Street

Perry, FL 32347 (850) 838-3500

Contact: Taylor County Grants Department

Jami Evans - Grant Coordinator

401 Industrial Park Drive

Perry, FL 32347 (850) 838-3553

jevans@taylorcoutygov.com

Projects: CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



Client: Citrus County Board of County Commissioners

110 N Apopka Avenue Inverness, FL 34450

(352) 341-6560

Contact: Citrus County Housing Services

Michelle Alford - Director

2804 W. Marc Knighton Court

Lecanto, FL 34461 (352) 527-7520

michelle.alford@citrusbocc.com

Projects: CDBG-DRI Housing Rehabilitation

Demolition and reconstruction of 3 homes

Awarded June 2019 – Anticipated completion September

2023

The budget for these projects was increased from \$1m to \$1.6m as these projects needed to be elevated to 2ft above

the Base Flood Elevation (BFE) therefore requiring the projects to become demolition/reconstruction projects. Due to COVID impacting the availability of construction materials, a time extension was requested to complete the projects.



Client: City of Palm Coast

160 Lake Avenue

Palm Coast FL 32164

(386) 986-2360

Contact: City of Palm Coast Planning & Zoning

Jose Papa – Senior Planner

160 Lake Avenue

Palm Coast, FL 32164

(386) 986-2469

jpapa@palmcoastgov.com

Projects: CDBG Entitlement Housing Rehabilitation

Ongoing housing rehabilitation

Guardian has been contracted with the City of Palm Coast

Housing Rehabilitation project since 2013.



Client:

City of Stuart

121 SW Flagler Avenue

Stuart, FL 34994 (772) 288-5300

Contact:

City of Stuart-Community Redevelopment Agency (CRA)

Pinal Gandhi-Savdas - Director

121 SW Flagler Avenue

Stuart, FL 34994 (772) 283-2532

pgandhi@ci.stuart.fl.us

Projects:

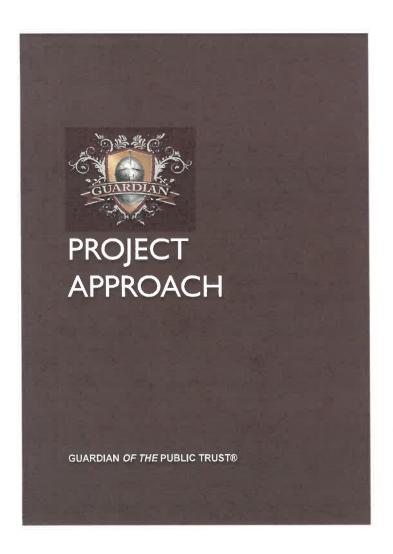
CDBG-Housing Rehabilitation FY2019

Housing rehabilitation of 11 units

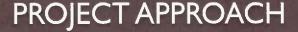
Awarded August 2021 – anticipated completion January

2024

This project is currently underway and is expected to remain



- Our approach and success in grant writing, program administration and compliance are comprehensive, detailed, and follows a proven work plan centered on quality control. We measure our performance by the benchmarks we establish based on research, funding, administration, compliance requirements and construction timelines and funder requirements.
- Guardian does not anticipate using any sub consultants in this project.





- Preliminary Activities:
- Background research to identify project/program needs & networking with County Staff, elected officials, department directors to determine priority needs & formulate appropriate grant proposals and solutions.
- > Develop leveraging strategies for each potential funding source.
- Kick-off meeting with County Staff; review all requirements and meet with any businesses, organization partners, and other team members who may provide, GIS mapping, engineering documents, etc.
- Meet with local agencies and organizations that support the County's funding needs and priorities to determine potential collaborative or matching opportunities.
- > Prepare & attend all required Public Hearings, County Commission meetings, CATF meetings, and Fair Housing activities.
- > Review and/or develop new policies required for the grant submission process.
- > Develop grant proposals outlining potential leveraging and/or match opportunities.
- > Develop grant applications and provide ongoing technical support to staff.
- > Prepare and submit final grant applications following County Commission approval.
- > Prepare for and provide representation and support during site visits.
- > Prepare/provide representation and support during community outreach or orientation seminars



- Complete supporting documents for grant award contract documents.
- Complete grant agreement work plans and budgets.
- Develop required project record and filing system for all local/original documents.
- Establish a duplicate grant contract file system for tracking grant activity (electronic format preferred).
- > Establish a master schedule with benchmarks and timelines.
- Prepare all required public notices.
- Prepare required request for comments.
- Prepare any needed maps or supporting documentation.
- > Policy and procedure review, including developer and/or non-profit agreements.

#### Post Award Activities:

- Prepare Environmental Review Records (ENVRR).
- Prepare FONSI advertisements and Request for Release of Funds (RROF).
- > Site/project specific inspections and ENVRR checklist as needed.
- Review/update/develop any required grant policies and procedures manuals.
- Review all grant agreements for compliance and special conditions.
- Establish grant performance measures and benchmarks of performance.
- Develop program forms and checklist for intake qualifications, bidding and contracting.
- Provide a sample / review/ update RFP/RFQ for contractors and vendors.
- Recommend short list of vendors (e.g. construction contractors, surveyors, & other needed services).
- Vet all contractors and vendors.



#### Outreach, Partner / Vendor Training & Support / Interface with County:

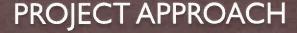
- Develop operating procedures & accompanying checklists, standardized reports for partners and vendors.
- Provide training, support, monitoring of day-to-day activity of partners, vendors.
- > Provide sample grant required forms, vetting forms, forms of agreement for contractors, partners, and vendors.
- Write RFP scopes of work and provide 2 CFR 200 and State language.
- > Attend pre-bid and bid meetings for support.
- > Write technical assistance answers to bid questions, including Technical assistance to selection committees.
- Develop scope and federal developer agreements.
- Quarterly zoom progress and strategy meetings.

#### Compliance Monitoring:

- > Oversee project schedule and compliance, including regular monitoring & updates.
- > Representation during monitoring/site visits, audits and community meetings.
- Coordination with other agencies, partners, recipients and contractors.
- Provide all other necessary technical assistance to staff and contractors.
- Prepare regular status reports, e.g. grant funding report, grant contract status, quality control activities & results, major accomplishments, success stories, etc., noteworthy meetings/accomplishments, work plan issues, budget and uses of funds.



- Updates to HUD 2880 disclosures, Section 3 and MBE/WBE performance reporting.
- Procedures for comprehensive identification of beneficiaries, if applicable.
- > Create monitoring, documentation and reporting of the efforts and results.
- Monitor all regular grant-funded project activity to ensure compliance.
- Davis-Bacon compliance for relevant activities, e.g. review of related contractor payrolls, wage interviews, project photos, etc.
- > Request Wage Decisions where applicable and provide sub-grantee/contract guidance for specific activities.
- Review construction contract documents and supporting information compliance.
- Review & ensure compliance with applicable laws, e.g., ADA/504 Handicap Accessibility, Uniform Relocation Act and Anti-Displacement, Copeland Anti-Kickback, Civil Rights, Fair Housing, all applicable parts of 24 CFR, and any other related federal requirements.
- > Oversight and coordination of citizen input and public meetings (coordination and response to citizen complaints/concerns).
- Develop, process and track amendments (action plans and other plans) where needed.
- ldentify conflicts of interest and coordinate the issuance of a waiver if necessary.
- Fraud prevention and monitoring.
- Monitoring and prevention of duplication of benefits.





#### Project Delivery Services:

- Conduct initial site visits.
- Meet with the Building Department, Purchasing Department, & other involved departments to coordinate bidding, permitting & inspections as needed for specific activities.
- Advise on / assist with expediting permitting.
- Provide guidance on establishing & managing construction schedules.
- Develop funder bid conditions for construction bid and review bid specifications prior to advertisement.
- Assist with finalizing the Scope of Work (construction bid).
- Work with your staff to bid out, select & receive approval for contractors and bids.
- > Coordinate meetings with staff and contractors to review and sign construction contracts, related documents.
- > Attend & provide technical assistance during any pre-bid, pre-construction conferences, & progress meetings as needed on all projects.
- > Review the Notice to Proceed for compliance so construction can begin.
- > Provide quality assurance/grant compliance construction inspections. Work with Building Department to coordinate inspections & approval of draw requests.
- Review all pay applications and change orders before approval.
- Review final construction documents for completeness.
- Davis Bacon Compliance



#### Financial Oversight:

- Assist with implementing an internal budget and setting up purchase orders, as needed.
- Review & advise on project financial management system for receiving/disbursing funds.
- Assist with financial reporting required by the funder.
- Assist with all Requests for Funds (RFF), working with County Finance Department.
- Review, advise, and establish layering plans for each program's eligible budget and activities to coordinate proper use and tracking of layered funds.
- > Review pay authorizations and change orders for compliance.
- Review grants amendments for compliance.
- > Advise on maintenance of project account records.
- Provide sample time sheets for tracking of eligible grant-funded staff time.
- Assist with responding to external and internal audit questions.
- Monitor developer agreement activities for compliance.



#### Project Closeout Activities:

- > Balance final project budget.
- Gather all necessary completion supporting documents.
- > Prepare documents for administrative/financial close out of projects.
- Research and prepare information/applications for new and continuing grants and their related funding cycles.
- > Document all warranties, release of liens, flood insurance, and related requirements.
- > Document all recordings of mortgage, note of deed restriction.
- All closed agreements documented complete.



# REFERENCES & SUCCESS IN CDBG GRANT APPLICATION & PROGRAM ADMINISTRATION



The Guardian team understands that providing **good communication**, **maximum accessibility** and **on-site capability** is critical to the successful application, program management and completion of a project. Many of our team members live and work locally to our clients. They work outside normal office hours and make every effort to respond to your phone calls, emails, text and/or fax requests within one business day or sooner. Please see below a list of our client projects within the last five (5) years only, including contact information, services provided, performance period and total amount of contract.

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
		CDBG			
Hendry County	2015- 2016	CDBG-HR	\$750,000	Grant Writing Services, Grant/Loan Program Administrative Services. The Guardian	
Population 42,000		Miscellaneous	\$20,000	team provided CDBG grant writing services and is currently providing program	
Sabrina M. Gadson	2017-	Grant Services		administration services.	
Housing and Social Services	2018-	SHIP	\$700,000	The Guardian team is providing program management, project delivery services for a	
(863) 675-5297 Sabrina.gadson@hendryfla.net	ongoing	Section 8	As needed	housing rehabilitation project and the SHIP Program. The Guardian team also	A CONTRACTOR OF THE PARTY OF TH
Saurina.gausoni@nenuryna.net		Housing Inspections	As fieeded	provides construction management, contractor bidding and selection,	
				constr. Inspection, Davis Bacon.	
City of Sebastian	2019 - ongoing	CDBG Entitlement	\$124,000 per year	Guardian is contracted to provide grant administration services.	No.
Population 25,000		Entitionent	\$120,000 + CV	Project to provide housing and sidewalk	
Lisa Leger Frazier,			CDBG	improvements.	THE PARTY
Director of Community Development					THE STATE OF
(772)589-5518 Lfrazier@cityofsebastian.org					

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Indian River County Population 159,900	2014- 2017	CDBG-NR	\$750,000	CDBG NR projects were for new sewer lines/components and sewer hookups, and infrastructure for a County firehouse.	
John Stoll Chief – Long Range Planner	2011- 2013	CDBG-NR	\$750,000	The Guardian team provided grant writing, is currently providing program management & project delivery services. The Guardian team will also provide	
(772) 226-1243 jstoll@ircgov.com	2017-	CDBG HR	\$750,000	construction management, contractor bidding and selection, constr. Inspection, Davis Bacon and program administration.	CIRC
	ongoing			Guardian provides ongoing initial inspections reports, detailed work writeups, cost estimates, and payment inspections.	
City of Avon Park	2011- 2013	CDBG-HR	\$750,000	The CDBG HR Projects provide housing rehabilitation and or replacement,	
Population 10,400	2017- current	CDBG-HR	\$750,000	improvements to owner-occupied LMI/VLI households. 2017 The Guardian team continues to provide grant writing,	
Mark Schrader City Manager mschrader@avonpark.city	2020-	CDBG- Mitigation CFHP	\$894,087	program management, project delivery services and financial layering expertise.	The last
	2020-	CDBG-MIT GIP	\$670,622	CDBG-Mitigation CFHP program will remodel and upgrade existing fire station.	
Hernando County  Population 193,900  Ms. Veda Ramirez,	2010- 2012	CDBG-NR	\$750,000, layered with County & City funding, total project cost of	CDBG NR Project for new sewer/water lines, fire hydrants, & road restoration in LMI neighborhoods. The CDBG HR project provides for housing rehab for LMI & VLI homes.	1/2
Health & Human Services Manager, (352) 540-4338 vramirez@hernandocounty.us	2015- 2016	CDBG HR	approx. \$1M. \$750,000, layered with County SHIP of \$50,000	The Guardian team continues to provide grant planning/application & program administration, contract prep & implementation, conducted household surveys, project inspections and financial management. Project management includes training, ENVRR, reporting and compliance monitoring throughout the program.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Citrus County Population 149,600	2010- 2012	CDBG-ED + leverage (Wal- Mart)	\$750,000 layered w/private funding of over	Project was for new water lines as part of the construction for job-creating business— Wal-Mart Supercenter. CDBG -DRI project is	
Sharon Watkins, Grant Administrator II (352) 527-5208	2015-15	CDBG-HR	\$2M. \$750,000	for demo/replace/elevate LMI homes damaged by hurricanes. CDBG-ED is for a Tech Recycling Plant. Guardian team provides grant application,	Low Price
Sharon.watkins@citrusbocc.com	2018-	CDBG-ED	\$560,000	administration, & program oversight. Including contract preparation implementation, conducting employee	
	2019	CDBG-DRI Infrastructure	\$1,000,000	surveys, project inspections & financial management.	
City of Palm Coast	2013- current	CDBG Entitlement-	\$varies/year based on action	The City contracted with Guardian for assistance with developing and	
Population 85,900  Jose Papa, AICP		Housing In progress	plan allocation.	implementing their CDBG Entitlement program. TA with ENVR Reviews, subordinations, etc.	
Senior Planner (386) 986-2469 jpapa@palmcoastgov.com	2020- current	Grant Compliance Assistance Services	2019 - \$20,000 in fees	The Guardian team prepared the City's on sight admin. files and continues to provide housing inspection and work write ups for rehabilitation, ranking of applicants, project oversight, develop entitlement files, forms, polices & procedures for the administration of their CDBG program.	
Town of Lake Placid	2012- 2014	CDBG-NR	\$650,000	Project was for water treatment plant improvements and wastewater lift station	
Population 1,900  Joe Barber Town Engineer/Utility Director	2017- 2018	CDBG-NR FEMA Pre Disaster	\$650,000 \$500,000	and needed road repaving. The second NR project was for building upgrades and modifications, generators, and construction of waste-water treatment plant. FEMA funds were used for generators. The Guardian team members provided funding	
(863) 699-3747 Iputilities@mylakeplacid.org	2017	CDBG-CR*	\$700,000	research, grant writing, financial leveraging, and program administration, including contract prep/implementation, project	
				oversight, and financial management for the grant on all projects.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
Osceola County Population 375,700	2009- 2011	CDBG-HR, SHIP	\$1,000,000 layered through SHIP and CDBG funds	Program addressed LMI/VLI homeowner rehab housing units. The Guardian team provided grant writing, program management, housing rehabilitation	
Danicka Ransom Housing Manager (407) 742-8400 dransom@osceola.org	2019- ongoing	CDBG/HOME	Task order	delivery services and financial layering expertise. Guardian continues to ongoing provide general services and tech support/environmental reviews	25 80
Columbia County Population 71,600	2016-	CDBG-NR CDBG-ED 17	\$750,000 \$1,000,000	NR Project was for the installation of water lines to connect to the city water system and road pavement.	
David Kraus County Manager	2018	CDBG -ED 18	\$1,500,000	Guardian performed grant administrative services, environmental reviews, project oversight & financial	
(386)623-6320 135 NE Hernando Avenue, Suite 203	2019-	CDBG-DRI	\$4,762,257 \$3,614,118	mgmt. for the grants. CDBG-ED project is expansion of County wastewater treatment plant. A second CDBG ED is for sewer and	
Lake City, FL 32055  David Kraus@columbiac ountyfla.com	2019	CDBG-HR	\$750,000	water mains to a shopping center. <b>Two DRI projects are for road flooding.</b> New CDBG is for housing rehabilitation.	
Desoto County  Population 38,000  Lauri Benson Social Services Director (863)993-4858 I.benson@desotobocc.com	2018 - ongoing	Grant Admin/Enviro. Review	Task Order per ENVR task	Project is for housing rehabilitation of LMI/VLI homes.  The Guardian team has been contracted to provide partial grant administration services, including document review and environmental review services for eleven (11) homes.	
City of Palmetto Population 13,600	2019	CDBG-ED	\$1,500,000	City is partnering with a hotel business to provide water, sewer, street improvement and stormwater. The SRF	
Jim Freeman City Clerk (941)723-45470 ifreeman@palmettofl.org	2019- current	SRF	\$8,000,000	funds will provide wastewater treatment plant upgrades.  The Guardian team is providing grant/loan writing & research, grant-loan admin., program management, technical support, and financial layering expertise.	

Project	Scope	Funded Amount	Type of Grants	Fund Year	Local Government
ilities on, and	The Guardian team has been contracted to provide Public Grant and Loan Funding Sources for Capital Facilities Planning, Program Administration, and Project Delivery Services for projects in CDBG regular category.	\$750,000	CDBG-HR	2019-	City of Stuart  Population 16,100  Pinal Gandhi-Savdas  CRA Administrator  772-283-2532  pgandhi@ci.stuart.fl.us
ery E	The Guardian team has been contracted to provide program administrative services for grant/loan funded projects for community and economic development, and Project Delivery Services for projects in CDBG regular category.	\$750,000	CDBG-HR	2019-	Taylor County  Population 21,800 Melody Cox 201 E. Green Street Perry, FL 32347 (850) 371-0377 melody.cox@taylorcountygov.com
Itilizing I Urban nity nds. licies ist and nswer	The Guardian team provides Technical assistance to create programs utilizing U.S. Department of Housing and Urban Development CDBG and Community Development Block Grant-CV funds. Assistance to include developing policies and procedures, application, checklist and continued technical assistance to answer questions and review items for compliance per CA7308.	\$70,000 PO and task orders	HUD/CDBG Technical Assistance	2020 -	Finance Department 1000 City Center Circle
	questions and review items for co				City of Port Orange Finance Department 1000 City Center Circle Port Orange, FL 32129 386 506-5717

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
	-	SHIP / CDBG	10000		
Martin County  Population 161,000  Michelle Miller Housing Program (772) 228-5456 mmiller@martin.fl.us	2011- 2012 2012- 2013 2013- 2014 2017- open	SHIP CDBG HR  In progress, currently contracted to administer all housing and CDBG programs	\$750,000 NR \$750,000 HR \$750,000 HR	Guardian was contracted for the overall management/compliance of the County's CDBG programs including SHIP. NR was for new sewer mains. HR was for housing rehab. Our responsibilities include: applicant intake, budget tracking, reports to FHIC & BOCC, inspections, SOW, bids, AHAC & public meetings, update LHAP, constr. Rehab, training, pay request approvals & response to client/homeowner.	Golden Gute Martin County Pedevelopment
Indian River County  Population 159,900  John Stoll Chief, Long-Range Planning Phone: (772) 226-1250 Fax: (772) 226-1922 srohani@ircgov.com	2014 – ongoing	SHIP Housing Program Inspection Services	SHIP awards have been varied	Guardian team provides initial inspections to inspect all major systems of identified units including; before digital pictures & provide those pictures to County with initial inspection report, prepare detailed work write-up, cost estimate, and submit the work write-up and cost estimate to staff, conducts pre-bid walk-thru for rehabilitation contractors interested in bidding on the project, reviews bids submitted for the project and provides comments to staff, reviews and approves any change orders submitted for the project, visits the job and prepares a punch list of unfinished items for all completed jobs.  Guardian also provides to the County documentation of notifications sent to Contractors and or Bidders, schedules and monitors all inspections in a timely manner and in accordance to contract and bid timelines. Completion of all inspection requirements conducted in accordance with HQS and Housing Plan requirements.	

Local Government	Fund Year	Type of Grants	Funded Amount	Amount Scope Project			
	2017	Other					
Sebring Airport Authority  Mike Willingham Registered Agent 128 Authority Lane Sebring, FL 33870 863-314-1300  Mike@sebring- airport.com	2017- 2018 ongoing	FEMA Public Assistance	FEMA Irma	Guardian provides ongoing technical and compliance consulting with FEMA P.A. grants portal and mitigation.			
Gateway Community Development District  Chris Shoemaker District Manager (239)284-0350 Chris.shoemaker@gatewaydistrict.org	2017- 2019- current	State Revolving Fund (SRF)	\$3,000,000+	Project is on the third phase of storm pond erosion control.  Guardian is providing grant research/application services for new FDEP grant and SRF loan opportunities, in addition to other applicable federal, state and other loan application.			
City of Deltona  Jessica Entwistle Administrative Assistant jentwistle@deltonafla.gov 2345 Providence Blvd. Deltona, FL 32725 386-878-8100	2016- current	Open – Tech. Assistance	Work based on Task Orders	Guardian has been contracted to provide Davis Bacon and FDOT compliance monitoring.	Deltona Deltona		
City of Port St. Lucie  Alessandra (Alex) Tasca Community Prog. Admin. Neighborhood Srv. Depart. (772) 871-7395 atasca@cityofpsl.com	2020-	Open- CDBG	Fees assessed by Tasks.	Guardian has just been awarded this contract to provide the City with CDBG Grant Administration to complete the City's 5-year Consolidated Plan.	PORTS		

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
City of New Port Richey  Population 16,223  Debbie Manns City Manager (727) 853-1021  MannsD@CityofNewPortRichey.	2021-	CDBG-HR	\$750,000	Guardian has just been awarded this contract to provide the City with CDBG Grant Administration.	New Port Richey Institution
City of Brooksville  Population 8,191  Charlene Kuhn Special Projects Coordinator (352) 754-4986 ckuhn@cityofbrooksville. us	2020-	CDBG	\$750,000	Guardian is providing Grant Writing and Grant Administration services for funding years 2020-2021.	Brooksville
Lake Placid Camp and Conference Center  Dr. Brian Wilson District Super Intendent (239) 561-1313 bwilson@sfnazarene.org	2020-	SRF- WW RIF Septic to Sewer	\$1,800,000 (80% Grant) \$570,000 \$600,000	Guardian is providing loan and grant application writing and program administration services for funded grants and loans.	LAKE PLACID Uses and Contract Uses:
City of St. Augustine  Population 14,581  Eric Walters Grants Administration Coordinator (904) 209-4302 ewalters@citystaug.com	2022-	SRF-DW CDBG-CV	\$1,600,000 \$1,251,299	Guardian is providing Grant Administration services for the St. Francis House Crisis Center Rehabilitation Project. Services include Environmental Review, grant compliance and reporting.	

Local Government	Fund Year	Type of Grants	Funded Amount	Scope	Project
City of Stuart  Population 16,100  Pinal Gandhi-Savdas  CRA Administrator  772-283-2532  pgandhi@ci.stuart.fl.us	2022-	CDBG-CV	\$4,791,000	Guardian is providing Grant Administration services for the small business incubator and job training program Project. Services include Environmental Review, grant compliance and reporting.	
City of Lake Worth Beach  Population 38,548  Julie Parham Assistant Director of Water Utilities (561) 586-1798 iparham@lakeworthbeachfl.gov	2020-	CDBG-MIT	\$989,262	Guardian is providing Grant Administration services for the storm hardening of the City's Water Treatment Plant Project. Services include Environmental Review, grant compliance and reporting.	(S)



July 28, 2023

Hernando County Board of County Commissioners Erin Kluis Briggs, Grant Writer 15470 Flight Path Drive Brooksville, FL 34604 (352) 754-4778 Ebriggs@co.hernando.fl.us

Dear Ms. Briggs:

As President and CEO of Guardian Community Resource Management, Inc. (the corporation), I hereby certify that the corporation maintains, in good standing, active checking and credit accounts with Wells Fargo Bank N.A. The corporation has been a client of Wells Fargo Bank N.A. since December 19, 2018. As the corporation's President and CEO, I certify that it has the stability, resources and the necessary working capital available to complete your project.

Wells Fargo Bank N.A. no longer provides financial status letters to its clients. However, should you need further verification of the corporation's financial stability, please do not hesitate to contact me directly at christine@guardiancrm.com.

Sincerely,

Christine Alday
President & CEO

STATE OF FLORIDA COUNTY OF PASCO

The foregoing instrument was executed before me this 28<sup>th</sup> day of July, 2023, by CHRISTINE ALDAY, as PRES/ CEO of GUARDIAN COMMUNITY RESOURCE MANAGEMENT, INC., who is personally known to me OR has produced \_\_\_\_\_\_ as identification.

(SEAL)

NOTARY PUBLIC

Experience, Service, Honor, Loyalty... Guardian
Serving Cities, Counties, CRAs, Housing Authorities, Airports and Your Local Organization
15000 Citrus Country Dr Ste 331, Dade City, FL 33523
Tel. (352) 437-3902 / Toll-free (888)-GUARD93 / Fax (863) 583-0357

www.guardiancrm.com

# Form W-9 (Rev. October 2018)

(Rev. October 2018) Department of the Treasury Internal Revenue Service

# Request for Taxpayer Identification Number and Certification

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

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

	1 Name (as shown on your income tax return). Name is required on this line; do Guardian Community Resource Man, Inc.	not leave this line blank.													
	2 Business name/disregarded entity name, if different from above			_		_									
	a Basiness Harris also squidos stitly Harris, it similates														
page 3.	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):														
s on	☐ Individual/sole proprietor or ☐ C Corporation ☐ S Corporation single-member LLC	state	Eva	mpt pa	/00 O	odo (if :	amu)								
ype	Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►									ariy) —					
Print or t	Trust/estate    Composition									code (if any)					
eci	To ther (see instructions) ► (Applies to accounts maintained outside the Control of the Control									the U.S.)					
တ္တ	5 Address (number, street, and apt. or suite no.) See instructions.		Request	ter's	name a	and a	ddress	(optio	onal)						
See	3020 Bruton Road														
	6 City, state, and ZIP code														
	Plant City, FL 33565  7 List account number(s) here (optional)														
	7 List account number(s) nere (optional)														
Par	Taxpayer Identification Number (TIN)					_		_							
	our TIN in the appropriate box. The TIN provided must match the nam	e given on line 1 to avo	oid I	Soc	cial se	curity	numb	er		-					
backu	p withholding. For individuals, this is generally your social security num	ber (SSN). However, fo				丁	П	$\overline{}$		Т					
	nt alien, sole proprietor, or disregarded entity, see the instructions for F s, it is your employer identification number (EIN). If you do not have a n		.			-	-		-						
TIN, la		umber, see now to get		or		_									
Note:	If the account is in more than one name, see the instructions for line 1.	Also see What Name a	nd [	Em	ployer	identification number									
Numb	er To Give the Requester for guidelines on whose number to enter.			1	3	- 4 3 0 9 2 5 2									
					3	4		١	9 2	5	2				
Part															
	penalties of perjury, I certify that:	- / /													
2. I am Sen	number shown on this form is my correct taxpayer identification numb not subject to backup withholding because: (a) I am exempt from bac rice (IRS) that I am subject to backup withholding as a result of a failure onger subject to backup withholding; and	kup withholding, or (b)	l have r	ot b	oeen n	otifie	d by t	he In	ternal						
	a U.S. citizen or other U.S. person (defined below); and														
	FATCA code(s) entered on this form (if any) indicating that I am exemp	t from FATCA reporting	is corr	ect.											
you ha acquisi other th	cation instructions. You must cross out item 2 above if you have been no ve failed to report all interest and dividends on your tax return. For real esta tion or abandonment of secured property, cancellation of debt, contribution nan interest and dividends, you are not required to sign the certification, but	ate transactions, item 2 ons to an individual retire	does no ment ar	t ap	ply. Fo	r moi t (IRA	rtgage ), and	inter gene	est pa rally, p	id, aym	ents				
Sign Here	Signature of U.S. person ▶ Antotine Mylelay	D	ate ►	7/2	28/2	023									
Ger	neral Instructions	• Form 1099-DIV (dividends)	idends,	incl	luding	thos	e from	sto	cks or	muti	ıal				
Section references are to the Internal Revenue Code unless otherwise noted.  • Form 1099-MISC (various types of income, proceeds)						e, priz	es, a	wards	, or g	gross					
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.						ertair	othe	r							
	• Form 1099-S (proceeds from real estate transactions)														
Purp	oose of Form	<ul> <li>Form 1099-K (merci</li> </ul>					-				•				
informa	vidual or entity (Form W-9 requester) who is required to file an ation return with the IRS must obtain your correct taxpayer	<ul> <li>Form 1098 (home m 1098-T (tuition)</li> </ul>			terest)	, 109	8-E (s	tudei	nt loar	inte	rest),				
	cation number (TIN) which may be your social security number individual taxpayer identification number (ITIN), adoption	• Form 1099-C (cance		1.											
taxpay	er identification number (ATIN), or employer identification number	<ul> <li>Form 1099-A (acquise</li> <li>Use Form W-9 only</li> </ul>									nt				
amoun	o report on an information return the amount paid to you, or other t reportable on an information return. Examples of information	alien), to provide your				heis	on (III	Juull	ıy a re	SIUC	111				
	include, but are not limited to, the following.  1099-INT (interest earned or paid)	If you do not return be subject to backup													

Department of Economic Opportunity – Small Cities Community Development Block Grant Program Form SC-37

## DE

# Certification Regarding Debarment, Suspension, and Other Responsibility Matters (Primary Covered Transactions)

April, 2015

Recip	pient:	Hernando County	Contract Number:	23-RFPG00380/FH
Nam	e of Co	ompany Selected as a Prime Contractor:	Guardian Community	y Resource Management, Inc.
DUN	IS Nun	nber: 0-23064675		
1)		prospective primary participant certifies cipals:	to the best of its knowle	edge and belief, that it and its
	(a)	Are not presently debarred, suspende voluntarily excluded from covered tr	ed, proposed for debarm ansactions by any Federa	ent, declared ineligible, or ll department or agency;
	(b)	Have not within a three-year period pludgment rendered against them for with obtaining, attempting to obtain, transaction or contract under a public statutes or commission of embezzlen records, making false statements, or a	commission of fraud or a or performing a public ( c transaction; violation onent, theft, forgery, bribe	a criminal offense in connection Federal, State or local) f Federal or State antitrust ery, falsification or destruction of
	(c)	Are not presently indicted for or other entity (Federal, State or local) with coparagraph 1)(b) of this certification; a	mmission of any of the	y charged by a governmental offenses enumerated in
	(d)	Have not within a three-year period public transactions (Federal, State or	preceding this application local) terminated for cau	n/proposal had one or more use or default.
(2)	Whe certif	re the prospective primary participant is fication, such prospective participant sha	unable to certify to any o	of the statements in this to this proposal.
Autho	orized Si	Strell aldy	7/28/23 Date	**************************************
			Date	
	orbett . Typed	Alday		
Vice Title	Presid	lent & COO		
11110				
	00 Citr Address	us Country Drive, Suite 331		
эпеег	Audres	5		
		FL 33523		
uty, S	itate, Zij	)		

### Disadvantaged Business Enterprise (DBE) Affirmation Statement

Prime Contractor/Prime Consultant: Guardian Community Resource Management, Inc.
Telephone Number: 352-437-3902
Address:15000 Citrus Country Drive, Suite: 331, Dade City, FL 33523
I hereby certify that the above stated contractor/consultant is a (select one):  ☐ DBE ☐ Non-DBE
Subcontractor Services List
Please list all subcontractors for services:
• Company Name:
Telephone Number:
Address:
The above company named is a (select one):  DBE Non-DBE
• CompanyName:
Telephone Number:
Address:
The above company named is a (select one):  DBE Non-DBE
Company Name:
Telephone Number:
Address:
The above company named is a (select one):  DBE Non-DBE
Company Name:
Telephone Number:
Address:
The above company named is a (select one):  DBE Non-DBE
Company Name:
Telephone Number:
Address:
The above company named is a (select one):  DBE  Non-DBE

#### **GOOD FAITH EFFORTS**

The County is committed to supplier diversity in the performance of all contracts associated with Federal and State funding projects. The County requires the Bidder/Contractor to make good faith efforts to encourage the participation of minority owned and woman owned and small business enterprises in accordance with applicable laws.

The Bidder/Contractor is required to submit documentation upon request to the County to reflect the affirmative action steps taken to utilize minority owned and women owned and small business enterprises in the work and the intended use of these companies in the work.

The Bidder/Contractor is required to include in their bid documentation that the Bidder has carried out these affirmative steps for Disadvantaged, Minority and Disabled Veterans Business Enterprise participation as follows:

- 1) Included qualified Disadvantaged, Minority and Disabled Veterans Business Enterprise on solicitation lists.
- 2) Solicited Disadvantaged, Minority and Disabled Veterans Business Enterprise whenever they are potential sources.
- 3) Divided total requirements, when economically feasible, into small tasks or quantities to permit maximum participation by Disadvantaged, Minority and Disabled Veterans Business Enterprise.
- 4) Where feasible, established delivery schedules which will encourage participation by Disadvantaged, Minority and Disabled Veterans Business Enterprise.

The following websites are provided to assist Bidder/Contractor with Affirmative steps.

i. U.S. Small Business Administration <a href="http://dsbs.sba.gov/dsbs/">http://dsbs.sba.gov/dsbs/</a>

ii. Florida Department of Transportation, Equal Opportunity Office <a href="http://www.dot.state.fl.us/equalopportunityoffice/">http://www.dot.state.fl.us/equalopportunityoffice/</a>

iii. http://www3b.dot.state.fl.us/EqualOpportunityOfficeBusinessDirectory/

iv. Florida Office of Supplier Diversity
<a href="https://www.dms.myflorida.com/agency">https://www.dms.myflorida.com/agency</a> administration/office of supplier diversity osd

Bidder/Contractor will be responsible for participating in these affirmative steps and providing documentation to that effect. County will be responsible to verify/certify it has obtained and reviewed documentation from the apparent lowest, responsive, responsible bidder demonstrating a good faith effort to facilitate Disadvantaged, Minority and Disabled Veterans Business Enterprise participation in this contract.

By signing my name below, I certify that I have read the above information. My signature also certifies my understanding and agreement with the above terms and conditions.

Horbelt aldy	7/28/23	
Authorized Signature	Date	
J. Corbett Alday		
Name (Printed)		

## CERTIFICATION FOR DISCLOSURE OF LOBBYING ACTIVITIES ON FEDERAL-AID CONTRACTS

(Compliance with 49CFR, Section 20.100 (b))

The prospective participant certifies, by signing this certification, that to the best of his or her knowledge and belief:

- (1) No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any federal agency, a Member of Congress, an officer of employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any federal agency, a Member of Congress, an officer or, employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities", in accordance with its instructions. (Standard Form-LLL can be obtained from <a href="https://www.gsa.gov/forms-library/disclosure-lobbying-activities">www.gsa.gov/forms-library/disclosure-lobbying-activities</a>)

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The prospective participant also agrees by submitting his or her proposal that he or she shall require that the language of this certification be included in all lower tier subcontracts, which exceed \$100,000 and that all such subrecipients shall certify and disclose accordingly.

Name	of Company/Firm: Guardian Communit	ty Resource Management, Inc.	
Ву:	Authorized Signature	Date: 7/28/23	<u> </u>
Title:	Vice President & COO		

#### DISCLOSURE OF LOBBYING ACTIVITIES

OMB Control Number: 4040-0013 Expiration Date: 2/28/2025

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

#### Review Public Burden Disclosure Statement

1. * Type of Federal Action:	2. * Status of Federal Act	ion:	3. * Repo	rt Type:
Oa. contract	Oa, bid/offer/application		<ul><li>a. initi</li></ul>	al filing
ob. grant	Ob. initial award		_	terial change
Oc. cooperative agreement	Oc. post-award			Material Change Only:
Oe, loan guarantee			year	quarter
Of. loan insurance			date	of last report
4. Name and Address of Reporting	Entity:			
②Prime OSubAwardee Tier if known:				
*Name Hernando County				
*Street 1 15470 Flight Path Driv	e Street 2			
Brooksville	State Florida			<sup>Zip</sup> 34604
Congressional District, if known:				
5. If Reporting Entity in No.4 is Subav	vardee, Enter Name and Ad	dress of Prim	e:	
* Name				
* Street 1	Street 2			
* City	Slate			Zip
Congressional District, if known:				
6. * Federal Department/Agency:	7. *	Federal Progra	am Name/	Description:
Housing and Urban Development	HUD) Co	mmunity Dev	elopment	Block Grant
	CFD	A Number, if applicable	e:	
8. Federal Action Number, if known:	9. A	ward Amount,	if known:	
	\$ [			
10. a. Name and Address of Lobbying	Registrant:			
Prefix Mr. *First Name James	Middle	Name Corbett		
*Last Name Alday	s	utfix III		
*Street 1 3020 Bruton Road	Street 2			
*City Plant City	State Florida			Zip 33565
b. Individual Performing Services (inclu				[00000]
Prefix *First Name	Middle	Name		
*Last Name		Suffix (		
'Street 1	Street 2			
· City	State			7ia
City				Zip
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the fier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.				
* Signature:				
*Name: Prefix Name: Prisi Name	James	Middle Nam	e 0	
'Last Name Alday	nailies	Suffix	© Corbett	
Miuay				20/0000
Title: Vice President & COO	Telephone No.: 352-4	37-3902	Date: [7/	28/2023
Federal Use Only:				STANDARD FORM LLL (REV. 7/1997) Authorized for Local Reproduction

Relatives and Former Hernando County Employees – Roles and Signatures

Part A: Employees that left Hernando County in the last two years.					
Employee Name/Sig	nature	Job Performed for Hernando County	Current Role with Business Entity	Date Left Hernando County	
Name:					
Involved with	n this Procurement on rnando County?				
	n Proposal development urement? No 🏻 Yes 🗍				
Name:					
behalf of Her No ☐ Yes ☐ • Involved with	n this Procurement on mando County?				
behalf of Her No ☐ Yes ☐ • Involved with	this Procurement on nando County?    nando Hounty?   n Proposal development   urement? No 🎞 Yes 🗌				
Part B: Identify Officers, Partners, Directors, Proprietors, Associates or Members of the Business Entity that are Relatives or Members of the Household of Hernando County employees currently working for Hernando County, If Hernando County employee had or will have any involvement with this Procurement of Contract.					
Firm Officer, Partner, Director, Proprietor, Associate or Member Name	Name and Relations Member of Househo Hernando	old Employed at	Role at Hernando County	Hernando County employee's Role with this Procurement	

(Make copies of this form as needed to list additional employees.)

#### HERNANDO COUNTY EMPLOYMENT DISCLOSURE CERTIFICATION STATEMENT

7/28/23 (date)	
Hernando County Purchasing and Contracts 15470 Flight Path Drive Brooksville, FL 34604	
The undersigned certifies that to the best of his/	her knowledge:
Is any Officer, Partner, Director, Proprietor a former employee of Hernando County wi	, Associate or Member of the Business Entity thin the last two (2) years? No ☑ Yes ☐
Is any Officer, Partner, Director, Proprietor a Relative or Member of the Household of had or will have any involvement with this I	
If the answer to either of the above question Former Hernando County Employees - Rol B, as applicable).	ons is "Yes", complete the "Relatives and les and Signatures" table (Part A and/or Part
Bidder:	
corbett.alday@guardiancrm.com	15000 Citrus Country Drive, Suite: 331, Dade City, FL 33523
(Email address)	(Address)
11.11111	
(Signature required)	813-943-2627 (Phone)
J. Corbett Alday	863-583-0357
(Print name)	(Fax)
Vice President & COO	13-4309252
(Print title)	(Federal Taxpayer ID Number)