

# City of Lauderdale, FL

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Proposal:  
RFQ 2024-018  
STATE AND FEDERAL TECHNICAL  
ASSISTANCE CONSULTANT

February 29, 2024

**CIVITAS, LLC**

600 Salty Alley | Mount Pleasant, SC 29464  
FEIN: 80-0443389 | UEI Number: MNU1A73ZJNX5



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**ATTACHMENT "A"**  
**PROPOSER'S QUALIFICATIONS STATEMENT**

PROPOSER shall furnish the following information. Failure to comply with this requirement will render Bid non-responsive and shall cause its rejection. Additional sheets shall be attached as required.

PROPOSER'S Name and Principal Address:

\_\_\_\_\_  
CIVITAS, LLC  
\_\_\_\_\_  
600 SALTY ALLEY MOUNT PLEASANT, SC 29464  
\_\_\_\_\_

Contact Person's Name and Title: Karl Erich Chatham, Owner

PROPOSER'S Telephone and Fax Number: 404-408-1256

PROPOSER'S License Number: N/A  
**(Please attach certificate of competency and/or state registration.)**

PROPOSER'S Federal Identification Number: 80-0443389

Number of years your organization has been in business, in this type of work: 15

Names and titles of all officers, partners or individuals doing business under trade name:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The business is a: Sole Proprietorship  Partnership   
Corporation

Name, address, and telephone number of surety company and agent who will provide the required bonds on this contract:

Blueprint Insurance Group, Inc  
\_\_\_\_\_  
357 N Shelmore Blvd, 2nd Floor Mt Pleasant, SC 29464  
\_\_\_\_\_  
843.216.8224  
\_\_\_\_\_

Have you ever failed to complete work awarded to you. If so, when, where and why?

No.

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Have you personally inspected the proposed WORK and do you have a complete plan for its performance?

Yes.

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Will you subcontract any part of this WORK? If so, give details including a list of each sub-contractor(s) that will perform work in excess of ten percent (10%) of the contract amount and the work that will be performed by each subcontractor(s).

No.

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The foregoing list of subcontractor(s) may not be amended after award of the contract without the prior written approval of the Contract Administrator, whose approval shall not be reasonably withheld.

List and describe all bankruptcy petitions (voluntary or involuntary) which have been filed by or against the Proposer, its parent or subsidiaries or predecessor organizations during the past five (5) years. Include in the description the disposition of each such petition.

None

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List and describe all successful Bond claims made to your surety (ies) during the last five (5) years. The list and descriptions should include claims against the bond of the Proposer and its predecessor organization(s).

N/A

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List all claims, arbitrations, administrative hearings and lawsuits brought by or against the Proposer or its predecessor organizations(s) during the last (5) years. The list shall include all case names; case, arbitration or hearing identification numbers; the name of the project over which the dispute arose; and a description of the subject matter of the dispute.

N/A

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List and describe all criminal proceedings or hearings concerning business related offenses in which the Proposer, its principals or officers or predecessor organization(s) were defendants.

N/A

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Has the Proposer, its principals, officers or predecessor organization(s) been CONVICTED OF a Public Entity Crime, debarred or suspended from bidding by any government during the last five (5) years? If so, provide details.


No.

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The PROPOSER acknowledges and understands that the information contained in response to this Qualification Statement shall be relied upon by CITY in awarding the contract and such information is warranted by PROPOSER to be true. The discovery of any omission or misstatement that materially affects the PROPOSER'S qualifications to perform under the contract shall cause the CITY to reject the Bid, and if after the award, to cancel and terminate the award and/or contract.

Spencer Christian  
By   
(Signature)



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To: City of Lauderhill's  
Purchasing Department  
5581 W. Oakland Park Blvd  
Lauderhill, FL 33313

From: Civitas LLC  
600 Salty Alley  
Mount Pleasant, SC 29464

**RE: RFQ 2024-018 STATE AND FEDERAL TECHNICAL ASSISTANCE CONSULTANT**

Civitas is pleased to present this proposal for professional services to the City of Lauderhill to provide ongoing HUD and state grant technical assistance and consulting services on an as-needed basis for its HUD Programs, namely, the Community Development Block Grant (CDBG) and other grant programs. Our housing and community development expertise and ability to deliver timely, innovative, and comprehensive services set us apart. Our knowledge of both the programming side and reporting requirements of Federal grants puts our team in a unique position to provide high quality products and truly useful affordable housing and community development insights that will help guide the City's strategies in compliance with federal, state, and local laws and regulations grant program.

We are well-suited to provide long-term consulting services and technical assistance. We specialize in HUD grant program development and compliance and we have successfully completed Consolidated Plans (ConPlans), Analysis of Impediments to Fair Housing Choice (AIs), Environmental Reviews (ERs), program development and implementation, IDIS, Financial Management Reconciliation, and general affordable housing related technical assistance for numerous clients throughout the country including Lauderhill, FL; Broward county, FL; Hialeah, FL; Miami Gardens, FL; Jacksonville, FL; Columbia, SC; Hudson County, NJ, and others. Our consultants also serve as HUD technical assistance providers and train grantees across the nation on the system.

These services and associated costs are based on our understanding of the City's needs, but we are always happy to adjust at your request. Civitas is ready to adhere to the services, costs, and timelines outlined in this proposal, and this signed cover letter binds the company for 60 days. Erich Chatham and Maggie Blake will serve as the primary contacts for this project. We look forward to furthering our working relationship with your staff and facilitating the provision of decent, safe, affordable housing to the citizens of Lauderhill.

Sincerely,

*Karl Erich Chatham*

Erich Chatham  
Civitas, LLC  
(843) 573-7825

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# Civitas, LLC

## Mission and History

### Firm Info

#### Firm Information

600 Salty Alley  
Mount Pleasant, SC 29464  
Phone: 843-573-7825

#### Experience

60 Years of combined  
community development and  
HUD experience

#### Firm Size

10 Full-time Employees

#### Firm Structure

Limited Liability Company

#### Year Founded

2009

#### Federal TAX ID Number

80-0443389

#### UEI Number

MNU1A73ZJNX5

#### Services

HUD Grant Technical Assistance  
Homeless Solutions  
Consolidated Plans  
Annual Action Plans  
Fair Housing Analyses  
Continuum of Care TA  
Environmental Reviews  
Community Needs Assessments  
Housing/Market Studies



Civitas, LLC is a research and community development consulting firm specializing in HUD Grant technical assistance. We are in the business of thinking and doing. We help state & local governments, non-profit, and for-profit enterprises solve problems and implement solutions. Our knowledge and experience with HUD programs, grant compliance, social science research, economic development, environmental reviews, and community revitalization put us in a unique position to assist a consortium of public and private entities in better meeting their missions.

We bring a passion for public service to our work in areas such as affordable housing development, grant writing & administration, program evaluation, research design & implementation, social & economic impact analysis, survey research, GIS mapping/spatial analysis, regulatory compliance, and project management.

We have written hundreds of HUD Consolidated Plans, Annual Action Plans, Consolidated Annual Performance Reports, dozens of market research and community needs assessments. We are highly proficient in HUD program design, implementation, and compliance.

Civitas has also worked with numerous clients to provide technical assistance, training, and program compliance review. Our HUD grant experience is highly sought after and nationally recognized.

Civitas was founded in 2009 by Jimmy Ardis and Erich Chatham, two graduates of the College of Charleston's Masters of Public Administration program. Civitas has a 15-year long history of successful work performance with clients across the country. Erich Chatham is now the principal owner and his dedication and hard work developed Civitas into one of the foremost housing policy firms in the country, particularly with regard to HUD programs.



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## Tab #2 – Statement of Capabilities

Over the last decade of business, Civitas has provided technical assistance and program management services to clients throughout the nation. Civitas possesses a comprehensive understanding of HUD programs and regulations, enabling us to address projects holistically. Our services span from consolidated planning to environmental reviews, financial risk assessments, and policy development. Specifically, we excel in formulating or refining policies and procedures for areas like CDBG, HOME, HOME-ARP, CDBG-CV, Davis Bacon, Section 3, and Lead-Based Paint. Our team provides best practice recommendations and design input for all HUD housing programs, economic development initiatives, homeless solutions, public services, and CHDOs. We've aided many jurisdictions in enhancing program compliance and design, and our offerings include program setup, project underwriting, HUD training, and more.

We have assisted multiple jurisdictions with applicant eligibility review for federal and local program administration, to include running the Emergency Rental Assistance Program (ERAP), local occupied homeowner housing and rental assistance programs, (TBRA) and small business assistance programs. We have a working knowledge and experience for developing (or updating) application packages, as well as completing eligibility reviews (via income certification, employment verification, and duplication of benefits assessment) to determine eligibility into the program. Our team's understanding of HUD compliance requirements for CDBG and HOME or state-run program requirements ensures our administration of these programs is conducted appropriately within the goals and limitations set forth by law and local policy.





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## Tab #3 – Specific Related Experience of the Firm

Civitas offers HUD grant technical assistance and program management services nationwide. Our team has managed program setup, application intake, and execution for various rental, housing, and rehab programs. We have produced numerous Consolidated Plans, Annual Action Plans, HOME-ARP Allocation Plans, Analysis of Impediments to Fair Housing Choice, Environmental Reviews, and CDBG-DR Action Plans. Moreover, we have supported cities with program delivery from federal, local, or private funding sources. Using our vast experience, we deliver high-quality, compliant documents tailored to each grantee and improve jurisdictions' program management and internal policies through our technical assistance and consulting services. Our firm possesses the capacity and expertise to supplement and enhance the City's efforts.

With a robust understanding of HUD programs and regulations, Civitas approaches projects from diverse perspectives, ensuring comprehensive solutions. From consolidated planning to environmental review and from financial risk assessment to policy development, our expertise spans multiple domains crucial for the City's strategic implementation and compliant reporting. We've aided numerous jurisdictions in program compliance and design reviews, ensuring improvements where necessary. Familiar with the intricacies of HUD compliance and financial management, we are adept at reporting for all HUD grant programs and training local staff to manage tasks beyond our contract.

### eCon Planning Suite Experience

Using HUD's IDIS-based e-Con Planning Suite, we craft Consolidated Plans, Annual Action Plans, and Consolidated Annual Performance and Evaluation Reports. Our team boasts unparalleled knowledge of this system, having engaged with eCon since its origin. Civitas consultants have even collaborated with HUD to train grantees on IDIS. With integral components of the grants management cycle embedded in the planning Suite, our expertise guarantees consistent alignment with Federal regulations and guidelines.



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## Experience Client List (Condensed)

### Ongoing Technical Assistance

Anderson, SC  
Horry County HOME Consortium, SC  
Lauderhill, FL  
N. Miami, FL  
Miami Gardens, FL  
Hialeah, FL  
Broward County HOME Consortium, FL  
Jersey City, NJ  
Harrisburg, PA  
Bristol Township, PA  
Jacksonville, FL  
Columbia, SC  
Lexington County, SC  
Spartanburg County, SC  
Greenville, NC  
Meriden, CT  
Hudson County, NJ  
Commerce City, CO  
Bridgeport, CT  
Homes of Hope, Inc  
St. Cloud, FL  
Colorado Springs, CO  
Meriden, CT  
Reno, NV  
Castle Rock, CO  
Thornton, CO  
Adams County, CO  
Lubbock, TX  
Lowcountry COG, SC (Consortium)  
Lower Savannah COG, SC (Consortium)  
State of New Mexico

### Analysis of Impediments

Horry County (Consortium), SC  
Spartanburg, SC  
Lexington County, SC  
Columbia, SC  
Wilmington, NC  
Greenville, NC  
Hialeah, FL  
Commonwealth of Pennsylvania\*  
State of Michigan\*  
St. George, UT  
Jersey City, NJ  
Hudson County, NJ  
Burlington, NC  
Charleston, SC\*  
Lower Savannah COG (Consortium), SC  
Bristol Township, PA  
City of Jacksonville, FL  
Broward County HOME Consortium, FL  
Florence, SC  
Berkeley County, SC  
Harrisburg, PA  
Council Bluffs, IA

### Annual Action Plans & CAPERs

Horry County Consortium, SC  
Spartanburg County, SC  
City of Spartanburg, SC  
Jacksonville, FL  
Miami Gardens, FL  
Bristol Township, PA  
St. George, UT  
Colorado Springs, CO  
Hialeah, FL  
Greenville, NC  
Marin County, CA  
Columbia, SC  
Harrisburg, PA  
Collier County, FL  
Hudson County, NJ  
Jersey City, NJ  
Meriden, CT  
Summerville, SC  
Reno, NV  
Broward County HOME Consortium, FL  
Commerce City, CO  
Stamford, CT  
Hialeah, FL  
Miami Gardens, FL  
Benton Harbor, MI  
Castle Rock, CO  
Fort Pierce, FL  
Sunrise, FL  
Stratford, CT  
Lubbock, TX

### Environmental Reviews

Horry County, SC  
Broward County, FL  
Collier County, FL  
Town of Davie, FL  
Hialeah, FL  
City of Anderson, SC  
Miami Gardens, FL  
Lexington County, SC  
City of Jacksonville, FL  
City of Greenville, NC  
Harrisburg, PA  
Port Arthur, TX  
Lauderhill, FL  
Meriden, CT  
Westminster, CO

### Consolidated Plans

Charleston, SC  
Horry County (Consortium), SC  
Columbia, SC  
Spartanburg County, SC  
City of Spartanburg, SC  
St. George, UT  
Lower Savannah COG, SC  
Lexington County, SC  
Greenville, NC  
City of Jacksonville, FL  
Bristol Township, PA  
Hinesville, GA  
Broward County (Consortium), FL  
Burlington, NC  
Hudson County, NJ  
Colorado Springs, CO  
State of New Mexico\*  
Jersey City, NJ  
Meriden, CT  
State of New Jersey\*  
Reno, NV  
Stamford, CT  
Hialeah, FL  
Miami Gardens, FL  
Benton Harbor, MI  
Berkeley, SC  
Castle Rock, CO  
Fort Pierce, FL  
Sunrise, FL  
Council Bluffs, IA

### Housing Needs & Market Assessments

Homes of Hope – Greenville, SC  
City of Spartanburg, SC  
Grand Strand Housing – Myrtle Beach, SC  
Horry County, SC  
Seewee Community, Charleston, SC  
Jacksonville, FL  
Adams County, CO  
Commerce City, CO  
Spartanburg, County, SC HNA

### Affordable Housing Grant Programs

New America CDC  
Homes of Hope, Inc  
Community Redevelopment Associates  
H.O.P.E. Ministries  
Rebuilding Together  
We Do Good Work, LLC  
United Way of Piedmont  
Genesis Homes, Inc  
Florida Housing Coalition

\*Subcontractor



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## Sample Work Product Links

Civitas has successfully completed or assisted with the completion of Consolidated Plans and AIs for communities across the country, including grant recipients in New Mexico, Nevada, Colorado, South Carolina, North Carolina, Florida, California, Texas, Tennessee, Utah, and Pennsylvania. Our firm also has several subcontracts with companies contracted directly by HUD to provide national technical assistance services grantees. Below are links to several completed Consolidated Plan. More projects and reports are linked on our website: <http://civitassc.com/projects>.

Horry County HOME Consortium, SC 2023 Consolidated Plan

<https://tinyurl.com/Horry-ConPlan>

City of Jacksonville, FL Consolidated Plan

<https://tinyurl.com/COJConPlan2021>

Berkeley County, SC 2021 Consolidated Plan

<https://tinyurl.com/BerkeleyCountyConPlan>

Florence, SC 2021 Analysis of Impediments

<https://tinyurl.com/Florence-AI-2021>

Broward County HOME Consortium 2020 Analysis of Impediments

<https://tinyurl.com/Broward-2020-AI>



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## Key Staff

### **Erich Chatham, Principal Owner**

**Mount Pleasant, SC**

Erich has 15 years of professional experience in the field and has worked on economic and community development projects with local governments, for-profits, and non-profits throughout New York, New Jersey, Pennsylvania, South Carolina, Florida, Utah, Georgia, Texas, and Colorado to name a few. He serves as a national technical assistance provider for the US Department of Housing and Urban Development and is a HOME Certified Specialist. In his role as a HUD TA Provider, Erich provides technical assistance to HUD grantees related to CDBG, CDBG-DR, HOME, and ESG program management. He has also conducted numerous IDIS and DRGR training workshops throughout the country.

Erich serves on numerous non-profit boards of directors including the Palmetto Community Land Trust, Grand Strand Housing and Community Development, the South Carolina Interagency Council on Homelessness and the Lowcountry Continuum of Care where he serves as the Chairman of the Governing Council. Erich received a Bachelor of Arts in History and Secondary Education Certification from Oglethorpe University in Atlanta, Georgia. He then taught high school economics and government and coached several sports for four years. He also holds a Master of Public Administration from the College of Charleston, with a focus on Economic Development and Urban Planning.

### **Spencer Christian, Director of Operations**

**Wahiawa, HI**

Spencer transitioned to housing and community development consulting after serving 10+ years in the United States Navy as an intelligence officer. Having spent time in cities and military bases throughout the US, Middle East, and Asia, he brings a unique, multinational perspective to housing and development. He delivers value and insight to urban development projects by leveraging his military background in analysis, policy review, financial oversight, and project management. Spencer has a keen interest in affordable and fair housing as well as supporting urban sustainability technology and culture. He maintains oversight on all projects to ensure transparency, timeliness, and quality. Further, he provides grants management compliance including policies and procedures development for all Civitas projects.

Spencer continues to serve as an intelligence officer with the US Navy Reserves. Prior to his service, he taught high school French and coached basketball. He holds a Bachelor of Arts in French from Georgia College and State University. Spencer completed his Master of Science in International Affairs from Georgia Institute of Technology.



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**Stan Fitterman, Senior Consultant, Housing and Disaster Recovery Tampa, FL**

Mr. Fitterman has over 25 years of experience providing nonprofit developers and local governments with hands-on assistance and advice on organizational development and operations as well as project-specific assistance on the development of single-family and multi-family housing. He has developed and delivered training to local governments and nonprofit organizations on the development of both home ownership and rental housing, business planning, marketing, financial management topics and federal and state compliance and monitoring issues. His deep understanding and skilled navigation of regulatory systems, market research, and financial feasibility have promoted Mr. Fitterman to a national expert. He has also assisted jurisdictions nationwide by providing technical assistance to local governments for disaster relief and recovery program development.

Stan earned his Bachelor of Science in Community Development from Georgia State University. He received his Master of City Planning, Georgia Institute of Technology.

**Maggie Blake, Associate Consultant and CDBG Grant Specialist Chicago, IL**

Maggie joined Civitas in 2021, bringing professional experience in homeless services, grant-writing, non-profit operations, and development. She has quickly become a top expert of HUD grant programs and required compliance across all grants. Her work with Civitas includes CDBG, HOME, and ESG program technical assistance and client interface. She regularly assists clients with the completion of HUD ConPlans, Annual Action Plans, CAPERs, IDIS technical assistance, and stakeholder outreach. Maggie completed a two-year teaching service program while earning a master's degree in education from the University of Notre Dame. She transitioned to homeless services, working for the Pope Francis Center in the heart of downtown Detroit. Her work in homeless services gave her well-rounded expertise in non-profit operations and federal grant management.

**Peter J. Neiger, Lead Analyst and ER Coordinator Indianapolis, IA**

Peter has eight years of professional experience in economic analysis, with five years specializing in housing policy issues. He will serve as the lead analyst on this project, a role he has excelled at on many similar projects. Some of these previous projects include ConPlans & AIs for Lubbock, TX; Irving, TX; Jacksonville, Florida; Charleston, South Carolina; and Greenville, North Carolina. Additionally, he has recently provided Environmental Review Technical Assistance for clients in Texas, Florida and North Carolina.

Peter has a Bachelor of Science in Economics from the College of Charleston. Before college, he joined the US Army where he served as an infantry paratrooper with the 82<sup>nd</sup> Airborne Division. Working with Civitas, Peter was a data analyst in Washington DC where he focused primarily on higher education reform. Peter currently serves on the Board of Directors for the Cape Fear Community Land Trust and is passionate about helping communities develop affordable sustainable housing.



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**Vern Xiong, IDIS Technician/Data and Visualization Specialist**

**St. Paul, MN**

Vern has worked with Civitas for six years as a research assistant and data collection expert. He serves as the team's IDIS specialist, combining his experience and technical proficiency to all ConPlans, AAP, and CAPERs. His experience spans housing studies across the country including, but not limited to, Columbia, SC ConPlan and AAP; Hudson County, NJ ConPlan and AAP; and St. George, UT ConPlan and AAP. In addition to his work with Civitas, he has worked on research and evaluation for non-profits in Minnesota and Colorado, as well as international development projects in Southeast Asia and Central America. Coming from a refugee family, Vern has a special interest in helping displaced people and secondary migrants adapt, make healthy living choices, and grow with their new communities.

Before working at Civitas, Vern managed Lao Family's Youth and Family program for seven years. He also helped lead many community development programs, including CDBG, in Minneapolis-St. Paul. Vern earned a Bachelor of Art from Greenville College, Illinois and a Certificate of Grant Proposal Writing from Fort Hayes State University.

**Kyle Jenkins, Homeless Solutions & ESG Grant Specialist**

**Myrtle Beach, SC**

Kyle is an ESG grant specialist and helps run operations with ECHO. He has over 5 years of experience of developing and administering homeless housing programs, homeless services and homeless database management/ reporting. Director level experience with managing nonprofit organizations, projects and initiatives, while delivering mission-critical results at all levels including program development, budgeting, administration, strategic planning, reporting and evaluation, and developing/ maintaining strategic partnerships and relationships with government agencies and community partners. He is the co- manager on administering the Emergency Rental Assistance Program (ERAP) for the City of Jacksonville, FL.

**Grace Orr, Associate Consultant - HUD Program Specialist**

**Charleston, SC**

Grace has six years of experience in housing and community development. She has worked with local governments and nonprofits managing various sources of federal funding. She has experience with CoC, CDBG, ESG, and HOME funding. She provides technical assistance for program management, policy development, compliance, and reporting. Grace joined Civitas in 2021 as the lead manager administering the Berkeley County, SC Emergency Rental Assistance Program (ERAP) and supported program management for several other jurisdictions. Prior to joining Civitas, she worked with the Lowcountry Continuum of Care. During her time with the CoC, she assisted with the annual consolidated application, monitored programs, managed the Coordinated Entry System, and directed the Annual Point in Time Count. She has also worked with a nonprofit serving human trafficking victims to implement a Rapid Re-housing program and administer federal grants. Grace earned her Master of Business Administration in Finance from the College of Charleston and a Bachelor of Science in Public Health from The Ohio State University.



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**Melanie Tucker, Grant Program Assistant**

**Charleston, SC**

Melanie joined the Civitas team as a parttime member in 2021 to assist with a variety of assistance programs and construction program application in-take and review. She provided Initial and Final review of applications for Emergency Rental Assistance Program (ERAP) for the City of Jacksonville, FL; Berkeley County, SC; and Horry County, SC. She is familiar with a variety of general and specific housing management programs to include Neighborly and Excel. She has vast experience with communicating via phone and email with applicants for both rental assistance and other programs.



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## Similar Projects

**Client:** Jacksonville, Florida

**Period of Performance:** September 2017 – Current

**Project(s):** 2018 ConPlan Substantial Amendment, CAPERs & Annual Action Plans, Neighborhood Strategic Counseling Services, Disaster Relief Program Consulting, HUD-program management, Environmental Reviews and related training, development of CDBG, HOME, ESG and HOPWA policy and procedure manuals, 2021 ConPlan and 2020 Analysis of Impediments, CARES Act amendment TA, Treasury ERAP1 and ERAP2 program administration, HOME-ARP Allocation Plan, HOME Utility Allowances

**Project Leads:** Erich Chatham

**Point of Contact:** Travis Jeffrey, Director of Neighborhoods Department

[TJeffrey@coj.net](mailto:TJeffrey@coj.net) | (904) 255-8227

**Client:** Broward County, Florida

**Period of Performance:** October 2015 – December 2015 & November 2017 – current

**Project(s):** 2020-2024 Consolidated Plan, IDIS Training, Technical Assistance, 2020 Analysis of Impediments to Fair Housing Choice

**Project Lead:** Erich Chatham

**Point of Contact:** Yvette Lopez, Manager Environmental Protection & Growth Management [YLOPEZ@broward.org](mailto:YLOPEZ@broward.org) | (954) 357-4930

**Client:** Horry County HOME Consortium, South Carolina

**Period of Performance:** 2013 – Current

**Project(s):** 2013-2017 Consolidated Plan; 2014 Analysis of Impediments to Fair Housing Choice; 2017 Assessment of Fair Housing, 2018-2022 ConPlan and 2023-2027 ConPlan, multiple Annual Action Plans, HOME program technical assistance as needed, HOME-ARP Allocation Plan, 2023-2027 ConPlan, Program P&P and Subrecipient agreements

**Project Leads:** Erich Chatham

Point of Contact: Michael Dobson, CDBG Deputy Director

[dobson.michael@horrycountysc.gov](mailto:dobson.michael@horrycountysc.gov) | (843) 915-704

**Client:** Miami Gardens, FL

**Period of Performance:** Winter 2019 – current

**Project(s):** 2021-2025 5-Year Consolidated Plan, 2021 Annual Action Plan, 2021 Analysis of Impediments to Fair Housing Choice, Environmental Reviews, HUD Program Technical Assistance, CARES Act TA, HOME-ARP Allocation Plan, IDIS TA, ongoing policies and procedures for all HUD programs, In-take program assistance, other general TA

**Project Leads:** Erich Chatham, Spencer Christian

**Point of Contact:** Tracey-Ann Anthony, Director of Community Development Services

[tanthony@miamigardens-fl.gov](mailto:tanthony@miamigardens-fl.gov) | 305-622-8000 ext 2300





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**Client:** City of Harrisburg, PA

**Period of Performance:** Fall 2018 – Present

**Project(s):** IDIS training, Environmental Reviews, financial management & reconciliations, environmental reviews, CAPERs, Annual Action Plan, HOME-ARP, HOME underwriting, ongoing Technical Assistance; HOME-ARP Allocation Plan development, 2023 – 2027 5-Year Consolidated Plan and 2023 Analysis of Impediments to Fair Housing Choice report

**Project Leads:** Erich Chatham, Kyle Jenkins

**Point of Contact:** Dennise Hill, Director, Department of Building & Housing Development

[dlhill@harrisburgpa.gov](mailto:dlhill@harrisburgpa.gov) | (717) 255-6411

Additional references and links to projects available upon request.



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## Tab #4 – Project Approach

Our team will be available as needed to provide ongoing, remote and on-site technical assistance for all aspects of HUD grant program management. Civitas understands the variety of tasks that may come from the scope of work detailed in the RFQ. We have experience to provide these services and are ready to assist with all elements listed. We will coordinate with the City to prioritize current and upcoming needs and lay out a strategic timeline for accomplishing agreed upon scope in order of priority.

Project management is done between our client lead and the director of operations. Ongoing check-in calls and email communication helps with coordinating the city's priorities and deliverables. We utilize individual team member for specific tasks as it relates to their experience and knowledge base. Specific assignments will vary according to our team's individual expertise and experience, as well as availability. High-level CDBG and HOME technical assistance will be provided by Erich or Maggie. Maggie, Grace, or Kyle will lead the efforts for program review, P&P updates, compliance monitoring, etc, Maggie and Vern serve as the primary IDIS experts. For environmental reviews, Pete is the lead ER coordinator and would take more of a coordinating role with staff directly as required. Erich or Spencer will work with city staff to understand priorities, context, and timelines, and assign Civitas members according to their knowledge base and availability.

After an initial kickoff, ongoing coordination will take place via email, Zoom, or phone. If regularly scheduled check-ins are requested, we can discuss options that make sense for all parties.



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## Scope of Services - Ongoing HUD Grant Technical Assistance

We are available and ready to assist according to the needs of the City on each of the following:

- HUD Compliance Management Assistance
- All IDIS functions including but not limited to:
  - o Project & Activity Set-ups
  - o Activity Funding
  - o Beneficiary Reporting
  - o Program Income Receipts
  - o Micro-Strategies Reports
- Ongoing technical assistance related to programmatic Policies & Procedures
- Compliance Management Assistance related to CDBG timeliness requirements
- Consolidated Plan (**flat rate pricing**)
- Annual Action Plans
- CAPER development
- HOME-ARP Allocation Plan assistance
- HUD Environmental Reviews (see separate price sheet)
- Assistance with submission of quarterly SF-425s
- Review and update of City's Citizen Participation Plan
- Assistance in conducting sub-recipient monitoring
- Review of HOME CDBG and SHIP Housing Assistance Plans
- Section 3 compliance and reporting
- Davis Bacon compliance and reporting
- Project Underwriting and feasibility analysis
- Assistance with preparations for HUD monitoring
- Policies and Procedures reviews/updates/development (CDBG, HOME, Section, 3, Davis Bacon, BABA, LAP, etc)
- Assist with developing of Consolidated Plan, Annual Action Plans, or CAPERs (**\*See separate ConPlan and AI pricing**)
- Prepare Environmental Review Records acceptable for HUD approval and release of Community Development Program funds. (**\*See separate ER pricing**)
- Assistance with preparations for HUD monitoring, and City's Response to Audit monitoring
- Assistance with development of policy and procedures for a Tenant Based Rental Assistance (TBRA) program
- On an as-needed/as-requested basis, provide basic tutorials and/or refresher to new and existing program staffs on HUD's and CDBG program requirements, including "how-to" steps to accomplish same
- Provide updated information and guidance on programs, such as CDBG and Home Investment Partnerships (HOME) programmatic policies and procedures as become known and including, but not limited to, Proposed and



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Final Rule Changes, potential impact to City's programs and/or procedures; and effective timelines.

- Other assistance to grant administrative staff, as may be requested on an as needed basis including, but not limited to, participating in meetings with staff to provide technical support (verbal or written); researching IDIS for needed data/program information; and appropriately responding to prompts and alerts in IDIS.
- Other general HUD grant-related tasks as requested

## Tab #5 – RFQ Attachments

**I. REQUIRED FORMS**

**Proposer Check List**

**Please indicate by (  ) that you have included the following documentation with your proposal:**

(X) The Proposer shall submit proof that the company is authorized to do business in the State of Florida

( ) If Proposer is MBE/WBE, please include a copy of the certificate from the Department of Management Services with the proposal

(X) Proposer has reviewed all the insurance requirements and is able to meet the requirements

**The following are forms that must be executed and returned with your submittal:**

- Proposer's Check List
- Submittal Signature Form
- Drug-Free Workplace
- Public Entity Crime Information
- Non-Collusion Affidavit
- Statement of Organization
- Conflict of Interest Form
- Consultant Affidavit
- Certification Regarding Debarment
- Certification for Disclosure of Lobbying Activities
- Truth-In-Negotiation Certification

**COMPANY:** CIVITAS, LLC

**SIGNATURE:** 

**ATTACHMENT "B"**  
**NON-COLLUSIVE AFFIDAVIT**

STATE OF South Carolina

COUNTY OF Charleston

Spencer Christian being first duly sworn deposes and says that:

BIDDER CIVITAS LLC is a representative the  
(Owner, Partner, Officer, Representative or Agent)

BIDDER is fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such Bid;

Such Bid is genuine and is not a collusive or sham Bid;

Neither the said BIDDER nor any of its officers, partners, owners, agents, representative, employees or parties in interest, including this affidavit, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other BIDDER, firm or person to submit a collusive or sham Bid in connection with the Contract for which the attached Bid has been submitted; or to refrain from bidding in connection with such Contract; or have in any manner, directly or indirectly, sought by agreement or collusion, or communications, or conference with any BIDDER, firm, or person to fix the price or prices in the attached Bid or any other BIDDER, or to fix any overhead, profit, or cost element of the Bid Price or the Bid Price of any other BIDDER, or to secure through any collusion conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Contract;

The price of items quoted in the attached Bid are fair and proper and are not tainted by collusion, conspiracy, connivance, or unlawful agreement on the part of the BIDDER or any other of its agents, representatives, owners, employees or parties in interest, including this affidavit.

By *Spencer Christian*

Subscribed and sworn to before me this 28 day of February, 2024.



*Karen Chatham*  
Notary Public (Signature)

My Commission Expires:  
June 9, 2033

# ATTACHMENT “C” COST SCHEDULE

## Cost Proposal

### Fee for Services

Civitas will be available for ongoing technical assistance on an *as-needed* basis at the below hourly rate or flat fees. Please note the flat fees for ConPlan and AI may require an amendment or separate approval if the city agrees to the above yearly amount.

#### \$150/hour

- Erich Chatham
- Spencer Christian
- Peter Neiger
- Kyle Jenkins
- Vern Xiong

#### \$135/hour

- Maggie Blake
- Kari Dettmer
- Grace Orr

#### \$100/hour

- Melanie Tucker

### Flat Rate Items

For the below services, Civitas charges the following flat rates. For all other services mentioned in scope, Civitas will charge an hourly rate as specific City needs will dictate the total estimated hours to complete.

- Consolidated Plan (full development) - \$30,000 (includes one site visit)
- Analysis of Impediments to Fair Housing Choice (full development) - \$25,000
- Site Visit - \$3,500 One Day (all-inclusive flat rate per person)
- HUD Environmental Reviews (*see following page*)





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## Environmental Review: Timeframe and Costs

Service	Price	Estimated Timeline
<b><i>Standard Reviews</i></b>		
Exempt/CENST	\$250	1-2 business days
CEST (One Site)	\$3,000	50-75 days
CEST (Each Additional Sites)	\$400	N/A
EA (One Site)	\$4,000	90-120 days
EA (Additional Sites)	\$600	1-2 business days
<b><i>Tiered Reviews</i></b>		
CEST Tier I	\$3,500	45-60 days
CEST Tier II	\$400-\$600*	Varies
EA Tier I	\$5,000	75-90 days
EA Tier II	\$300-\$1,000 *	Varies
<b><i>Compliance Steps</i></b>		
5-Step Decision Making Process	\$400	Does not alter original timeline.
8-Step Decision Making Process	\$1,000	
Site Inspection and Photos	\$2,500-\$4,250*	
<b><i>Additional Services</i></b>		
HEROS Upload	\$500**	1-2 business days
Re-Evaluation	\$150/hr	Varies
ER Policies and Procedures	\$2,000	30-40 days
Central File Development	\$250	5-7 days
Virtual Training	Varies	Varies

\*The price for completing these tasks will vary depending on the project details and will be confirmed prior to completion.

\*\* Reduced price when included with the completion of an environmental review.

## ATTACHMENT "D"

### CONFIRMATION OF DRUG-FREE WORKPLACE

In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibitions.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or Contractual services that are under Bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employee that, as a condition of working on the commodities or Contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any State, for a violation occurring in the workplace no later than five (5) days after the conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

A signed copy of your Drug-Free Workplace Policy must be attached to this signed copy and submitted with the Bid Documents.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



---

Vendor's Signature

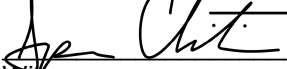
**ATTACHMENT "E"**  
**SIGNATURE PAGE**


The undersigned attests to his (her, their) authority to submit this Submittal and to bind the firm(s) herein named to perform as per agreement. Further, by signature, the undersigned attests to the following:

1. The Proposer is financially solvent and sufficiently experienced and competent to perform all of the work required of the Proposer in the Contract;
2. The facts stated in the Proposer's response pursuant to Request for Submittals, instructions to Proposer and Specifications are true and correct in all respects;
3. The Proposer has read and complied with, and submits their proposal agreeing to all of the requirements, terms and conditions as set forth in the Request for Proposals.
4. The Proposer warrants all materials supplied by it are delivered to the CITY of Lauderhill, Florida, free from any security interest, and other lien, and that the Proposer is a lawful owner having the right to supply the same and will defend the conveyance to the CITY of Lauderhill, Florida, against all persons claiming the whole or any part thereof.
5. **Proposer understands that if a team is short listed and selected to make oral presentations to the selection committee and/or CITY, only the team members evaluated in the written submissions may present at the oral presentations. Any changes to the team at the oral presentations will result in that team's disqualification.**
6. The undersigned certifies that if the firm is selected by the City the firm will negotiate in good faith to establish an agreement.
7. Proposer understands that all information listed above may be checked by the City of Lauderhill and Proposer authorizes all entities or persons listed above to answer all questions. Proposer hereby indemnifies the City of Lauderhill and the persons and entities listed above and holds them harmless from any claim arising from such authorization or the exercise thereof, including the dissemination of information pursuant thereto.

Submitted on this 28 day of Feb, 2024

(If an individual, partnership, or non-incorporated organization)

  
\_\_\_\_\_  
Witness Spencer Christian  
\_\_\_\_\_  
Printed Director of Operations  
\_\_\_\_\_  
Title

CIVITAS, LLC  
Company   
\_\_\_\_\_  
By Karl Erich Chatham, Owner  
\_\_\_\_\_  
Printed Name, Title

(If a corporation, affix seal)

\_\_\_\_\_  
Company  
\_\_\_\_\_  
By  
\_\_\_\_\_  
Printed Name, Title

Attested by Secretary

Incorporated under the laws of the State of South Carolina.

CERTIFICATE  
(For Corporation)

I HEREBY CERTIFY that a meeting of the Board of Directors of CIVITAS, LLC, a corporation under the laws of the State of South Carolina held on February 25, 2024, the following resolution was duly passed and adopted:

"RESOLVED, that Spencer Christian, as Director of Operations of the Corporation, is hereby authorized to execute the Bid Form dated February 28, 2024, between the City of Lauderhill, Florida, and this Corporation, and that the execution thereof, attested by the Secretary of the Corporation and with corporate seal affixed, shall be the official act and deed of this Corporation".

I further certify that said resolution is now in full force and effect.

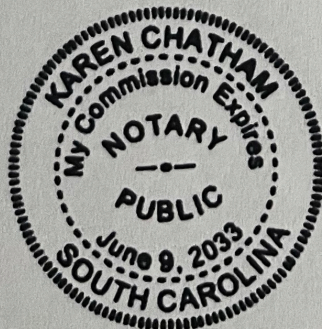
IN WITNESS WHEREOF, I have hereunto set my hand this 26 day of Fds, 2024

[Signature]  
Secretary

~~STATE OF FLORIDA~~ South Carolina  
COUNTY OF Charleston

Sworn to and subscribed before me on this 28 day of February, 2024  
by Spencer Christian who  is personally known to me or who  has presented the following type of identification: \_\_\_\_\_

[Signature]  
Signature of Notary Public, State of Florida



Notary seal (stamped in black ink)  
OR  
Printed, typed or stamped name of Notary and  
Commission Number




## DEBARMENT CERTIFICATION FORM

The Contractor certifies that neither the Contractor firm nor any owner, partner, director, officer, or principal of the Contractor, nor any person in a position with management responsibility or responsibility for the administration of federal funds:

- a) Is presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from covered transactions by any federal or state department/agency;
- b) Has within a three-year period preceding this certification been convicted of or had a civil judgment rendered against it for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public transaction or contract (federal, state, or local); violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;
- c) Is presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local) with the commission of any of the offenses enumerated in paragraph (b) above; or
- d) Has within a three-year period preceding this certification had one or more public transactions or contracts (federal, state, or local) terminated for cause or default.
- e) The Contractor is “Actively” registered with Service for Award Management (SAM), and has been assigned the following Unique Entity Identifier (UEI) Number:  
MNU1A73ZJNX5 (provide number here).

The Contractor further certifies that it shall not knowingly enter into any transaction with any subcontractor, material supplier, or vendor who is debarred, suspended, declared ineligible, or voluntarily excluded from covered transactions by any federal state department/agency.

Dated this 28 day of February, 2024

By   
Authorized Signature for Contractor

Spencer Christian, Director of Operations  
Printed Name and Title



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
3/8/2022

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

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

PRODUCER: Blueprint Insurance Group, Inc. 357 N Shelmore Blvd., 2nd Floor Mount Pleasant, SC 29464
CONTACT NAME: (A/C, No, Ext): (843) 216-8224 FAX (A/C, No): (843) 216-8224
E-MAIL ADDRESS: information@blueprotects.com
INSURER(S) AFFORDING COVERAGE: INSURER A: Ohio Security Insurance Co NAIC #: 24082
INSURER B: United States Liab Ins Co
INSURER C:
INSURER D:
INSURER E:
INSURER F:

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

Table with 8 columns: INSR LTR, TYPE OF INSURANCE, ADDL INSD, SUBR WVD, POLICY NUMBER, POLICY EFF (MM/DD/YYYY), POLICY EXP (MM/DD/YYYY), LIMITS. Rows include Commercial General Liability, Automobile Liability, Umbrella Liab, Workers Compensation, and Professional Liability.

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

CERTIFICATE HOLDER: City of Lauderdale 5581 W. Oakland Park Blvd Lauderdale, FL 33313
CANCELLATION: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
AUTHORIZED REPRESENTATIVE: [Signature]