



Building Faith | Inspiring Hope | Igniting Change

**Request for Proposal
Comprehensive Stand-by Disaster Preparedness, Response,
Recovery and Grant Management Services
August 7, 2020**

You are invited to submit a bid for Comprehensive Disaster Recovery and Grant Management Services for various Catholic entities throughout the United States and Territories, as defined further in this document.

Deadline for bid submittal:	5:00 pm Central Time, August 28, 2020
Bids shall be submitted to:	Robert Anderson, Assistant VP of Mission Catholic Extension 150 South Wacker Drive, Suite 2000 Chicago, IL 60606
Method of submittal:	Mail Delivery, or Email
Contact information:	Robert Anderson 312-795-6095, randerson@catholicextension.org

General Provisions

Catholic Extension (CE), as a representative body with a formal relationship with Roman Catholic dioceses, eparchies, and religious orders throughout the United States and Territories, may facilitate procurement of goods and services at the request of the partner dioceses, is facilitating the issuance process for a stand-by disaster preparedness, response, recovery, and general grant management services. CE is utilizing a joint procurement, permitting CE and partner dioceses, eparchies, religious orders, and their affiliate institutions greater economy and efficiency in accessing resources related to the services described herein. Evaluations for on-call, stand-by disaster preparedness, response, recovery, will consider the experience and expertise of provider(s) to suit the needs of all dioceses and affiliate institutions recognized as parties to this agreement.

Catholic Extension and the dioceses reserve(s) the right to reject any and all proposals and to accept, in whole or in part, the proposal which in its judgment is the most responsive and qualified proposal. Proposals will be evaluated promptly after being received and we plan to announce our preferred provider by 8/21/20. CE and each diocese will then work with that selected provider to negotiate an agreement suitable to both parties, using the terms of the proposal. In the event an agreement cannot be reached, a re-issuance of this request may occur.

Registration

If provider wish to register their interest in proposing, email the Contact on the opening page with the subject line, "Register." While this is not necessary, every effort will be made to circulate updates to interested parties, including answers to Frequently Asked Questions.

Question and Answer Session

Each potential respondent is welcome to submit questions via email, to the contact listed above; and the Contact for this proposal will make every effort to respond via a FAQ document. Our goal is to inform each interested provider equally; however, it is the responsibility of each provider to ensure they are adequately prepared to propose and respond to the requirements outlined in this RFP.

**Do not contact diocesan staff with questions; all questions should be
directed to the Contact on the cover page.**

Catholic Extension

Catholic Extension is a papal society building churches and the Church in America's poorest places. Since 1905 Catholic Extension has been building up and strengthening Catholic faith communities across America by providing funding and resources to poor churches to unleash the transformative power of faith. With the generosity of individual donors and local and national foundations, CE raises funds to help these poor, forgotten and often isolated communities flourish. Since its founding, Catholic Extension has distributed more than \$1.2 billion in today's dollars to dioceses that cannot support themselves.

- CE invests in buildings by supporting the construction and renovation of churches and church facilities.
- CE invests in leaders for the Church by providing education, training and support to seminarians, priests, sisters, deacons and lay leaders.
- CE invests in ministries by supporting pastoral, youth, young adult, campus and outreach ministries, Catholic schools and religious education.

Catholic Extension's funding supports isolated and/or financially under-resourced Catholic dioceses in the United States. After a disaster, substantial event, or in cases of significant need, Catholic Extension may be the first call for any American diocese looking for technical, logistical, and/or financial assistance. Catholic Extension, through its financial partnership with a diocese, offers assistance in navigating the recovery process, identifying and seeking additional funding to support the dioceses operations and support of Catholic faith communities, or providing centralized services, such as this RFP, to help support individual and/or groups of dioceses seeking assistance.

As such, any diocese, Catholic religious order, eparchy, regional group of dioceses, or formally recognized and affiliated Catholic faith community may access services of the provider(s) selected under this agreement. This includes, but is not limited to, the following Catholic faith organizations and their affiliate religious orders, institutions, and/or subsidiaries:

CATHOLIC EXTENSION MISSION DIOCESES

Agana (Guam)	Gaylord, MI	Pensacola-Tallahassee, FL
Alexandria, LA	Grand Island, NE	Portland, ME
Amarillo, TX	Great Falls-Billings, MT	Pueblo, CO
Anchorage-Juneau, AK	Helena, MT	Rapid City, SD
Baker, OR	Houma-Thibodaux, LA	Reno, NV
Beaumont, TX	Jackson, MS	Sacramento, CA
Belleville, IL	Jefferson City, MO	St. Thomas (Virgin Islands)
Biloxi, MS	Juneau, AK	Salina, KS
Birmingham, AL	Knoxville, TN	Salt Lake City, UT
Bismarck, ND	Kalamazoo, MI	Samoa Pago Pago
Boise, ID	Lafayette, LA	San Angelo, TX
Brownsville, TX	Lake Charles, LA	San Bernardino, CA
Caroline Islands (Micronesia)	Laredo, TX	Santa Fe, NM
Chalan Kanoa (Guam)	Las Cruces, NM	Santa Rosa, CA
Charleston, SC	Lexington, KY	Savannah, GA
Cheyenne, WY	Little Rock, AR	Shreveport, LA
Colorado Springs, CO	Lubbock, TX	Springfield-Cape Girardeau, MO
Crookston, MN	Marquette, MI	Steubenville, OH
Dodge City, KS	Marshall Islands (Micronesia)	Stockton, CA

Duluth, MN
El Paso, TX
Fairbanks, AK
Fargo, ND
Fresno, CA
Gallup, NM

Memphis, TN
Mobile, AL
Monterey, CA
Nashville, TN
New Ulm, MN
Owensboro, KY

Superior, WI
Tucson, AZ
Tulsa, OK
Tyler, TX
Youngstown, OH
Yakima, WA

EASTERN RITES EPARCHIES

Eparchy of Our Lady of Nareg (Armenian)	Glendale, CA
Eparchy of St. Josaphat (Ukrainian)	Parma, OH
Eparchy of St. George (Romanian)	Canton, OH
Eparchy of St. Maron (Maronite)	Brooklyn, NY
Our Lady of Lebanon (Maronite)	St. Louis, MO
St. Thomas Diocese (Syro-Malabar)	Chicago, IL

ARCHDIOCESES AND RELIGIOUS ORDERS OF PUERTO RICO

Archdiocese of San Juan and affiliated Religious Orders	Including all affiliate Parishes, Missions, Schools, Colleges/Universities, and Healthcare Centers Including all healthcare, educational, community, and public welfare institutions
Diocese of Arecibo and affiliated Religious Orders	Including all affiliate Parishes, Missions, and Parochial Schools Including all educational, community, and public welfare institutions
Diocese of Fajardo – Humacao and affiliated Religious Orders	Including all affiliate Parishes, Missions, and Parochial Schools Including all educational, community, and public welfare institutions
Diocese of Caguas and affiliated Religious Orders	Including all affiliate Parishes, Missions, and Parochial Schools Including all educational, community, and public welfare institutions
Diocese of Mayaguez and affiliated Religious Orders	Including all affiliate Parishes, Missions, Parochial Schools, Colleges/Universities, and Hospitals Including all healthcare, educational, community, and public welfare institutions
Diocese of Ponce and affiliated Religious Orders	Including all affiliate Parishes, Missions, Parochial Schools, and Colleges/Universities Including all educational, community, and public welfare institutions

Scope of Basic Services

Catholic Extension, and partner dioceses, are seeking a provider(s) to support ongoing and future disaster preparedness, disaster cost recovery, and general grant management activities. This includes services for 2016, 2017, 2018, 2019, 2020 locally or federally declared disasters, as well as future potential declarations that may impact a partner diocese or regional group of dioceses. The provider(s) may also be requested to support general grant activity, as required by CE, an individual diocese, and/or regional group of dioceses. The selected provider will assist the CE and individual dioceses in:

I. **Strategy and Technical Assistance**

Tasks associated with identifying, seeking, and securing eligible or available grant funding, strategic and technical guidance in disaster response and recovery in the case of local and/or federal disaster declaration, identifying and responding to key policy impacts on dioceses operations or response and recovery efforts, and developing strategic approaches on eligible and appropriate uses of grant funding by CE and/or dioceses.

II. **Program Management**

Tasks associated with developing core program teams, as needed by CE, dioceses, or regional groups of dioceses, with the governance, coordination, communication, and operations of preparedness, response, recovery, or grant-funded programs. This includes identifying specific requirements of grant funding, establishing tools, policies, and procedures to support the effective implementation of grant-funded activities, and supporting clear messaging and effective tools to communicate to stakeholders, granting agencies, and within the CE network. This may also include, as necessary, preparation and support of closeout activities, audit readiness, or appeals.

III. **Additional Support**

Additional specialized consulting and technical support as requested by CE, an individual diocese, or a regional group of dioceses that may be required and requested of the provider under this agreement.

Federal Programs may include, but are not limited to: FEMA Public Assistance; FEMA Section 404 and 406 Hazard Mitigation Programs; HUD Community Development Block Grant (CDBG), Community Development Block Grant – Disaster Recovery (CDBG-DR), and Community Development Block Grant – COVID (CDBG-COV), or Emergency Solutions Grants (ESG); Federal Highway Authority (FHWA) and Federal Transit Administration (FTA) Emergency Relief Program(s); Department of Education specialized grant funding; CARES Act funding; and other Federal, State, private, or non-profit funding available to CE and/or an individual diocese.. In addition, the awarded firm will also provide project development and grants management services.

Examples of Federal and State grants management services that may be required, include:

I. **FEMA Public Assistance Advisory Services**

1. Provide extensive knowledge, experience, and technical competence in dealing with Federal regulations, specifically including the Robert T. Stafford Disaster Relief and Emergency Assistance Act, the Post-Katrina Emergency Management Reform Act of 2006, and the Sandy Recovery Improvement Act of 2013.
2. Evaluate and assist in the formulation, execution, and closeout of FEMA PA Emergency and Permanent Work Projects ("Projects"). This will involve expertise in cost estimating, developing detailed damage descriptions and dimensions ("DDD's"), technical assistance, and project scopes of work ("SOW"), and cost estimates ("CEs").

3. Meet as necessary with diocesan/State/Federal representatives in connection with the programmatic, financial, contracting, and eligibility and process issues, at the request of the client.
4. Evaluate and recommend potential alternate and/or improved projects.
5. Evaluate the appropriateness of the use of FEMA pilot programs including the Section 428 Public Assistance Alternative Procedures for Permanent Work and Debris Removal.
6. Develop a process/system to efficiently submit Federal grant applications, identify eligible projects, capture costs, prepare cost reports, reconcile invoices, and close-out projects.
7. Prepare first and second appeals, and arbitration, and Prepare projects for audit and respond to audit findings as requested.

II. FEMA 404 and 406 Hazard Mitigation Expertise

1. Assist in identifying, developing and evaluating opportunities for hazard mitigation projects to reduce or eliminate risk from future events (both Sections 404 and 406).
2. Develop hazard mitigation proposals (HMPs), and if needed benefit-cost analysis (BCA), to protect damaged elements and facilities from future damage.
3. Prepare hazard mitigation proposals, grant applications, benefit cost analysis, and other services related to Hazard Mitigation Grant Program, Pre-Disaster Mitigation, and other mitigation programs.

III. HUD Community Development Block Grant and Emergency Solutions Grant Support Services

1. Provide knowledge, experience and technical competence in the planning, administration, and implementation of eligible CDBG and/or ESG activities as identified at 24 CFR 570 and modified or waived under the Federal Register allocation of the disaster specific CDBG funding, such as CDBG-DR or CDBG-COV.
2. Conduct unmet needs assessments that identify type and location of the community's needs, especially in the three core aspects of development and recovery – housing, infrastructure, and the economy.
3. Provide extensive knowledge of CDBG and/or ESG eligible activities and national objectives particularly as they apply to local needs and/or disaster recovery, and develop and submit Action Plans.
4. Provide technical assistance as requested including HUD level environmental reviews and clearance and other cross-cutting federal requirements such as documentation, procurement, federal labor standards, fair housing, accessibility, uniform administration, closeout, and monitoring and compliance.

IV. FHWA / FTA Support

1. Advise and provide technical support for FHWA Disaster Relief and/or FTA Disaster Relief funding.

V. Pandemic Response and Recovery Strategic and Technical Support

1. Advise and provide technical support on interpretation of Federal and State policy, appropriations, regulations, and guidance regarding funding made available for pandemic preparedness, response, and recovery, including, but not limited to, the CARES Act, the Families First Coronavirus Response Act, and the Paycheck

- Protection Program and Health Care Enhancement Act.
2. Assist in the development of recovery funding strategies or key programs and operations, as necessary.
 3. Assess the financial impact of the pandemic and identify and provide guidance on the allocation of expenses to the appropriate funding sources that will maximize flexibility and potential financial support made available to a diocese.
 4. Tracking and submission of required financial reporting as required by the federal and/or state funding, including developing tools and resources to support financial and documentation tracking related to pandemic preparedness, response, and recovery.
 5. Provide guidance, training, technical assistance, and/or policy support as needed, including in the case of request for information, certified reporting, closeout, audit, and/or appeal.

VI. Financial / Grants Management Support and Information Technology

1. Advise on Federal, State, or grant-specific regulation and policy on tracking costs, including direct administrative costs and, to facilitate reimbursement for all eligible client costs.
2. Categorize, record, track and file costs in support of the financial reimbursement process, track grant status, including spending and reimbursement, and develop IT solutions that support such grants management.
3. Perform internal controls assessment and support compliance monitoring activities.
4. Provide expertise using systems to report information to assist in the management of the disaster recovery programs.

VII. Resilient Community Planning Program Support

1. Develop a resilience strategy and program and set goals and strategy early.
2. Conduct preparedness-related services (including training design and execution) and associated pre-disaster recovery planning (including disaster cost recovery, debris management, and hazard mitigation).
3. Conduct response-related services (including training design, support of the Emergency Operations Center, and execution).
4. Conduct preparedness-related services that support (directly or indirectly) a jurisdiction's resilience program.

Proposal Format

To be considered as fully-responsive, the response should include the following sections, either tabbed or organized in electronic sections.

A. Specificity of Response

Proposals may be addressed to one or more diocese and no proposer is required to serve all dioceses, as each diocese will evaluate the responses independently. However, in order to simplify the proposal process and encourage responses, proposers may address their proposal to one or more dioceses.

B. Qualifications of the Firm

Provide a description and history of the firm focusing on previous Federal and State Public Assistance (PA) program experience and applicability of the Robert T. Stafford Disaster Relief and Emergency

Assistance Act, as amended, Federal Regulations (including 44 CFR 206, the standards at 2 CFR 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards which applies to disasters declared on or after December 26, 2014 and 44 CFR 13.36 – Procurement which applies to disaster declared before December 26, 2014), and FEMA policies (the 9500 Policy Series for disasters declared prior to January 1, 2016 and the Public Assistance Program and Policy Guide for disasters declared on or after January 1, 2016) as a prime contractor.

Qualifications should reference the following elements:

1. Experience with strategic and technical assistance for 501(c)3 applicants and other non-profit applicants, including Houses of Worship, in managing Federal and State funding.
2. Experience with Federal and State Funding for Pandemic Relief, including the CARES Act and the Families First Coronavirus Response Act.
3. Years of experience working with the Public Assistance Grant Program, at the Federal, State or local level, including project development, project audit, documentation review, eligible cost reconciliation, audit checklists, the development of successful appeal/appeal responses, and closeout.
4. Experience with all categories of work in man-made and natural disasters, with expertise in the tracking of force account labor, equipment reimbursement, supplies, donated services, mutual aid, and contracted services.
5. Experience developing, reconciling, or reviewing large portfolios of federal grants, including supporting clients with combined recovery portfolios of federal funding, such as FEMA PA and CDBG-DR.
6. Experience developing and implementing innovative solutions to difficult PA and CDBG- DR problems, and innovative uses of these grant streams.
7. Experience in Program Conformance with pre- and post- construction projects, including but not limited to: producing detailed estimates, performing quantity surveys, participating in design development meetings, and reviewing progress design documents for conformance to budgeted scope of work
8. Experience in managing projects with at least three funding streams, including, but not limited to: Insurance; 404 and 406 Hazard Mitigation; FHWA; HUD; and FEMA.
9. Experience performing A-123 Internal Controls Review and Improper Payment Act reviews of U.S. Department of Homeland Security (DHS) programs.
10. Experience managing the financial functions of a large-scale disaster response and/or recovery program, including experience managing multiple concurrent local or federally declared disasters.
11. Experience implementing a comprehensive financial and grant management system for the FEMA Public Assistance program.
12. Experience developing Letters of Interest (LOIs) for the FEMA 404 and 406 Hazard Mitigation Program.
13. Experience working with HUD CDBG-DR grant programs at the Federal, State or large local government level, including program design and monitoring.
14. Experience performing internal controls reviews and improper payment reviews.
15. Experience administering the FEMA Community Disaster Loan program.
16. Experience with programmatic disaster closeouts.
17. Knowledge and understanding of HUD's Disaster Recovery Grant Reporting (DRGR) data management system including Action Plan set-up and Quarterly Reporting.
18. Knowledge of HUD's requirements for housing programs including rehabilitation, reconstruction, acquisition, buyout, relocation, and rental assistance.

19. Knowledge of HUD's requirements for infrastructure and public facilities including FEMA PA match programs; economic development activities; and HUD requirements for calculating duplication of benefits in compliance with the Stafford Act.
20. Experience proactively and successfully solving disagreements during project formulation rather than through appeals and arbitration.
21. Experience supporting after action reports and incorporating best practices and lessons learned into plans, policies, and procedures.
22. Experience developing Recovery Redevelopment Plans. Long Term Recovery Plans following the National Disaster Recovery Framework, Disaster Cost Recovery Plans, and providing EOC Augmentation and Response Planning.
23. Experience working within US Territories and Commonwealths, including Puerto Rico.

C. Qualifications of Staff

Provide an organizational chart, bios/resumes, and summary of staff qualifications for the firm.

As a large contingent of CE-supported dioceses seeking services are located in Puerto Rico, please showcase any Puerto Rican staff, expectations of hiring Puerto Rican staff for certain roles (even if these are currently open positions on the organizational chart), should services be requested by a Puerto Rican diocese.

D. Past Performance

Provide a minimum of three references for which the firm has performed services in the past that are similar to the requirements in the Scope of Services. Provide a description of the project, the reference contact name, title, e-mail address, telephone numbers, date of the contract/period of performance, and any prior assessments they have completed of your work. In addition, provide any additional evidence of consistently successful experience on past projects.

Please describe your direct or relevant experience related to the following issues:

- Experience working with Catholic Church entities, including dioceses, affiliate institutions, and/or religious orders
- Understanding of the new FEMA regulations regarding houses of worship
- Any clients represented, or prior positions taken with FEMA/SBA/other, which might be averse to the efforts being mounted on behalf of the Church's recovery efforts
- Experience working with projects in US Territories and Commonwealths, specifically Puerto Rico
- Experience working in rural communities

E. Technical Approach

Provide a description of your firm's approach to the project, to include start-up procedures, process to prepare project management plans and/or FEMA PA projects and accompanying documentation, and quality control procedures.

F. Cost Proposal

General Costs

Each Proposer must submit the hourly fee schedule and experience/expertise required for each billable team role. The cost proposal will be evaluated on the hourly rates submitted on the cost proposal form for the labor positions listed.

Given that raw hourly rates may not tell the entire story, please explain any methods or procedures you employ to operate more cost-efficiently across your team.

All non-labor other direct costs, including travel and lodging, will be billed to the dioceses at cost without mark-up. The provider's policy for incurring such costs should be described (i.e. coach class travel, moderate hotels, etc.). Please include a policy statement on reimbursable travel if your firm has one.

Please describe any significant expenses not typically reimbursable under federal and state reimbursement policies.

Start-up Costs / Mitigation Strategies

Catholic Extension believes that certain work required to secure governmental assistance must be completed before aid begins to flow to the dioceses. Each presenter is requested to present an estimate of start-up costs likely to be incurred prior to funding beginning from government agencies. This could be a combination of fixed expenses and variable expenses. Please describe, as best as practical, the drivers of variable start-up costs (i.e. number of projects, amount of damage, number of buildings, etc.). As each project will be unique, providers should focus on general start-up costs of activating a team to support a diocese in a one (1) month period for rapid assessment, initial strategic policy advice, and developing an initial project management and staffing plan.

Please also include strategies you would recommend, such as phasing of projects, which could mitigate the cumulative amount of unfunded start-up costs.

G. Recommendations

Based upon your review of this RFP, along with any FAQs issued:

- ☐ Are there any requirements you find unacceptable and would recommend be changed to make the project proceed more efficiently?
- ☐ Are there any obvious recommendations for protecting the Dioceses from out-of-pocket costs?
- ☐ Any additional services/expertise your firm provides, which are not accounted for in this RFP?

Selection Criteria

The following weighted criteria will be utilized to determine the provider that provides the best value and to select the consultant to be awarded this contract:

Qualifications of the Firm	20
Qualifications of Staff	20
Past Performance	25
Technical Approach	20
Cost Proposal	15
TOTAL	100

Contract Terms

The selected provider(s) will enter into an on-call preparedness, response, recovery, and general grant management contract for a period of five (5) years, with an option to extend for one (1) year for up to five (5) additional years. At any time under this contract term, CE, an individual diocese, eparchy, or diocese-

affiliated institution or religious order may request and negotiate services per the terms of the contract agreement in an individual project task order. Task orders will be limited to the scope of services captured in this joint procurement and subsequent contractual agreement and will be subject to the same requirements as the resulting contract.

This joint procurement and resulting contract with the selected provider(s) shall include the right to assign and transfer terms of the agreement and delegate performance under the contract, as agreed to by the provider(s), CE, and the relevant diocese(s). Contract provisions may require additional compliance with federal, state, and local provisions, as required by the locality, individual diocese, or as required by grant terms and conditions.

Insurance Requirements

The provider shall maintain, at all times while performing work at the properties, the following insurance on its own behalf. Insurance companies shall have an A.M. Best Rating of "A-: Class VII" or better. The provider will furnish to CFCS Certificates of Insurance evidencing this coverage and reflecting the effective date of such coverage as follows:

1. Workers Compensation and Employers Liability: The provider shall maintain statutory Worker's Compensation Insurance and Employers' Liability coverage for all of its employees who will be engaged in the performance of this work. This shall include special coverage extensions, where applicable, as required by the laws of California. Liability limits of \$1,000,000 per each accident or occupational sickness or disease shall be required.
2. Commercial General Liability: The provider shall maintain Commercial General Liability Insurance on an "Occurrence Basis" with limits of liability not less than \$1,000,000 per occurrence and/or aggregate combined single limit.
3. Automobile Liability: The provider shall maintain Automobile Liability Insurance with limits of not less than \$1,000,000 per occurrence combined single limit Bodily Injury and Property Damage. Coverage shall include all owned, non-owned and all hired vehicles.
4. Errors and Omissions Liability: The provider shall maintain coverage of not less than \$4,000,000.