
TOWN OF COLCHESTER, CT

REQUEST FOR PROPOSAL
CONSULTANT SERVICES FOR
AMERICAN RESCUE PLAN ACT (ARPA) FUNDS

PROPOSAL

JANUARY 26, 2022

Submitted by:

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A. TRANSMITTAL LETTER

January 26, 2022

Town of Colchester, Connecticut

First Selectman's Office

RFP 2022-001

Project Consultant for Use of ARPA Funding

127 Norwich Avenue, Suite 201

Colchester, CT 06415

UHY Advisors, Inc.

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Columbia, MD 21046

6 Executive Drive, Suite 111
Farmington, CT 06032

Dear First Selectman:

UHY Advisors (UHY) is pleased to present our qualifications to serve the Town of Colchester, Connecticut (the Town). We understand that the Town is seeking an experienced consultant to assist with the management of the American Rescue Plan Act of 2021 (ARPA funds) as part of a five-year plan with completion in 2026. The ARPA funding that the Town will expend has the potential to transform the Town, if managed effectively and efficiently.

This pandemic posed an extreme test of the government's ability to manage its effects on businesses, and provide safety for its citizens. UHY has responded to this challenge by developing a proven approach to help its ARPA clients successfully navigate through this uncharted territory.

Why UHY?

1. UHY brings over 40 years of experience advising municipalities on strategy, obtaining, and management of **federal grants** generally. In fact, many municipalities across the nation have entrusted UHY to manage their ARPA program as you will see in this proposal.
2. Our Farmington, Connecticut, office is part of UHY's Northeast region, which has served New York and Connecticut businesses and organizations for over 55 years through the efforts of over 250 professionals. This **local office** has a strong public sector practice and will provide ease of communication and ready access for the Town. This office and your quality control Principal, Stacy Farber, have been engaged in providing ARPA services to the City of Bristol and the Town of Wallingford.
3. UHY provides a turnkey operation, helping our clients with the full **lifecycle of ARPA fund management** from Strategy, Continuous Monitoring to Reporting; for others, we've successfully supported them with partial/limited areas of the lifecycle.
4. Our technology platform partner, **Civil Space**, will enable an effective community outreach maximizing awareness and ensuring your commitment to equity and diversity. Their platform supports multilingual requirements and even accommodates individuals with vision and/or hearing impairments.

EXISTING ARPA CLIENTS

- City of Bristol, CT
- Town of Wallingford, CT
- City of Chelsea, MA
- City of Detroit, MI
- Anne Arundel County, MD
- City of Wilmington, DE
- City of Chester, PA
- Cass County, MO
- City of Chattanooga, TN

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5. You are currently using the general ledger software of another teaming partner of UHY, **Tyler Technologies**. We would like to point out that we are familiar with their Enterprise Data Platform and Recovery Insights™ tool as a solution that has the capability to fulfil the grants and data management requirements. In the approach section of this proposal, you will find relevant examples showcasing how other Tyler government clients are using this solution.

As a Managing Director of the firm, I am authorized as an individual to contractually bind UHY Advisors. We take no exceptions to the RFP requirements and are in receipt of all addenda issued. We certify that the proposal and any cost projection included will remain in effect for 120 days after the due date. We look forward to the opportunity to be of service to the Town on this engagement. Please contact me with any comments or questions at 410 423 4832 or jreagan@uhy-us.com.



Jack Reagan, CPA
Managing Director | UHY Advisors, Inc.

B. DESCRIPTION OF WORK TO BE PERFORMED

b. A concise and complete description of the work to be performed, including:

1. An explanation of your firm's understanding of the project, its approach to the work, the key issues to resolve and the level of detail that can be accomplished for the work.

1. UHY'S UNDERSTANDING OF THE PROJECT

We understand that the Town's Long-Term Recovery Committee was established to identify the short- and long-term needs of the Colchester community as residents and businesses recover from the COVID-19 pandemic. A report was created based on survey responses from the community and identified areas of impact and priority from which several recommendations could be considered to respond to the needs of the public. Through the use of a qualified consulting firm, the Town will ensure accurate assessment of allowability of project to receive ARPA fund in each U.S. Treasury-defined programmatic areas.

We understand that the consultant will operate under and report to the First Selectman at the Town, and that the scope of work entails:

- *Programming assistance: support the First Selectman, ARPA Ad-hoc Committee and the Board of Selectmen pertinent to a funding distribution plan, including grant distributions and/or incentives.*
- *Support the First Selectman, ARPA Ad-hoc Committee and the Board of Selectmen with use and administration guidelines for projects, eligible programs and incentives.*
- *Review/create an overall schedule that includes implementation of individual project/program components. Relevant to programs and incentives, review/develop guidelines for distribution of funding. Review/develop compliance procedures inclusive of compliance testing of grantees.*
- *Review/create a marketing and communications outreach plan to assist non-profit and business applicants with development of eligible projects/programs and submission of ARPA eligible funding applications.*
- *Provide appropriate reports, support Town staff and attend meetings as required to provide information required by the Board of Selectmen, Town departments and the ARPA Ad-hoc Committee as applicable.*
- *Provide budget management and reporting of American Rescue Plan funds coordinating with the Town's Finance Office and financial reporting system. Reconcile with the Town's general ledger system (Tyler Munis) on not less than a monthly basis, to ensure that all costs are being accounted for, tracked and reported accurately. Assist with and provide information required for Treasury interim and quarterly reporting.*
- *Prepare and issue a final close-out report to the Town and to the Treasury Department, including a financial reconciliation.*

All operational working records and reports must be retained for a minimum of five (5) years beyond the expiration of the contract, following which such records will be required to be turned over to the Town. The selected firm shall be required to make such operational working records and reports available, during the term of the contract and for five (5) years beyond the expiration of the contract.

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RESPONSE TO THE SCOPE OF SERVICES

Signed into law on March 11, 2021, [The American Rescue Plan Act of 2021](#) (ARPA) provides \$350 billion in funding for state and local governments. The funding provided under ARPA provides a unique opportunity for state and local governments to make strategic investments in long-lived assets, rebuild reserves to enhance financial stability, and cover temporary operating shortfalls until economic conditions and operations normalize.

The final rule, issued by the Department of the Treasury to enable ARPA, is a 400+ page document filled with complex rules and regulations. The reporting requirements after spending the money are comprehensive. Even seasoned grant professionals can be challenged by the myriad of responsibilities that come with spending federal money. It is a daunting undertaking. We can help.

Our overarching goal is to:

- Perform your required tasks while keeping the big picture strategic goals in mind
- Bring our innovative community outreach platform from Civil Space
- Think creatively on how to leverage your existing Tyler Munis' capabilities
- Leave you well-positioned for continued effective and efficient grants administration and compliance
- Minimize the risk of "claw back" by the federal government
- Engage a team who has current experience with administering and reporting on ARPA funding
- Streamline the compliance and reporting process to ensure that the Town is well-positioned to seamlessly provide post-award grants administration

UHY will provide all services in compliance with the legal requirements as set forth in the American Rescue Plan Act of 2021 while making sure that the Town is maximizing its ARPA fund and not "leaving money on the table".

Throughout the engagement, we will provide the Town with programmatic and policy advice on ARPA programs; and, if needed, position papers interpreting government guidance and its everyday impact on the Town's internal control over financial reporting and compliance. We will make recommendations on how to implement the federal policy and procedure changes.

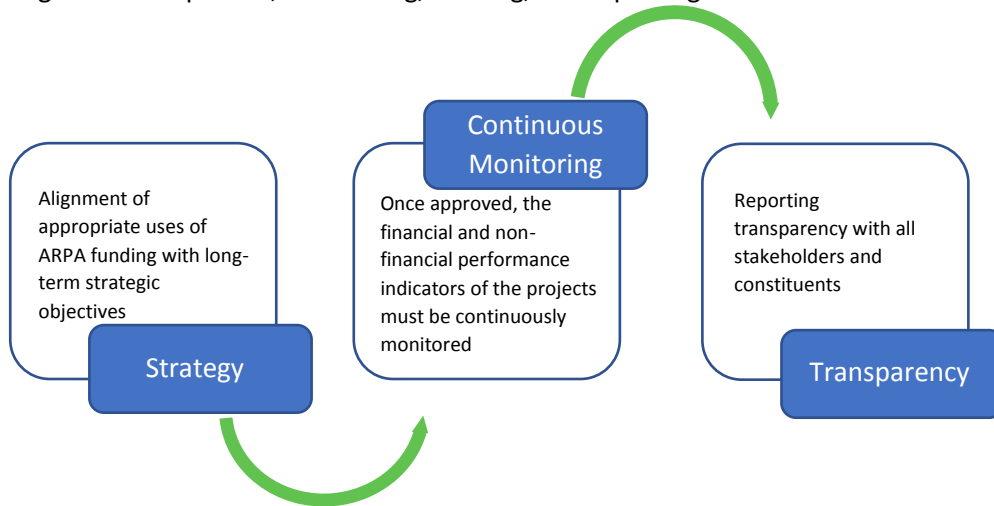
In serving our clients, we utilize our proven consistent/standard ARPA approach enabling us to provide a benchmark/baseline with other comparable counties. We:

- Document lessons learned and best practices from ongoing ARPA engagements to better serve present and future ARPA engagements.
- Communicate these lessons learned and best practices through quarterly webinars and meetings.
- Reach out to your peer group to share plans and understand challenges, followed by the creation of a written peer report.

The following describes our ARPA approach and demonstrates our capabilities to successfully execute projects and expenditure of ARPA funds in compliance with and adherence to relevant federal requirements for the Town.

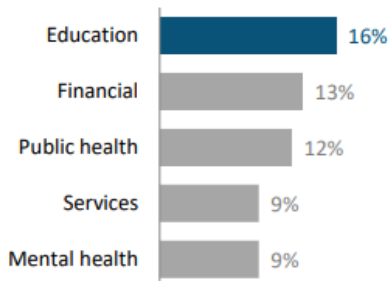
APPROACH

When ARPA came into effect in March of 2021, we recognized the need for a rigorous methodology and developed an effective approach which covers three main areas: *Strategy*, *Continuous Monitoring*, and *Transparency*. We have confidence the Town can significantly benefit from grouping all ARPA activities into these areas. We have utilized this consistent approach to provide guidance, strategic planning advice, oversight and compliance, monitoring, training, and reporting.

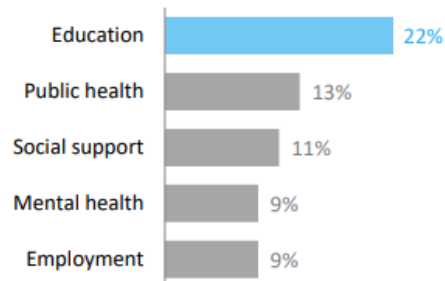


We have reviewed your Resident Survey Result report issued by the Colchester Long-Term Recovery Committee to begin a conversation with the Town’s Board of Selectmen and address the needs of the community. The Survey indicates the short-term and long-term impacts as follows:

Top 5 themes for help needed now



Top 5 themes for help needed long-term



We will take into consideration the results of the work of the Long-Term Recovery Committee into our standard approach to hit the ground running and expedite the evaluation of APRA applications, eligibility assessment, and adjudication and award. Once this phase is completed, we will move on to assist you with ongoing continuous monitoring and reporting.

Strategy The Town has substantial discretion to use the ARPA funds in ways that best suit the needs of its constituents. Such use must fit into one of the following four categories: *1) Responding to public health and economic impacts of COVID-19, 2) Capacity to provide public safety, public health, and human services staff, to include premium pay for essential workers, 3) Lost revenue replacement, and 4) Capital expenditures and necessary infrastructure investments.*

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During this phase, we will take your strategic priorities and future vision for the Town into consideration, ensuring alignment between the Town's strategic goals and its ARPA plan. As part of this process, we will document our findings regularly and provide recommendations for potential improvements and propose options for an implementation strategy.

Recent changes in the U.S. Treasury regulations permit recipients to use up to \$10 million of their ARPA funds as an offset to revenue losses without the need to perform the detailed calculations. This standard exemption is a policy that many governments throughout the U.S. are using to provide them with the maximum flexibility in spending their ARPA funds. We highly encourage the Town to consider using this revenue loss exemption to provide it with this flexibility while considering other uses of its ARPA funds. Should the Town utilize the maximum allowed revenue loss, its full allotment, you will need to report that election to the U.S. Treasury as part of your annual project and expenditure report in your 2022 report. Nothing needs to be subsequently reported. However, in our discussions with governments throughout the United States that are using this exemption, they are determining that they still need assistance in identifying and administering projects to be funded with their ARPA monies.

In either event, in the first two weeks of the engagement, leveraging your existing survey report, we will assess the Town's current strategy for its community awareness/engagement and guiding principles and provide recommendations. If there is a need for further community outreach, we can promote community awareness through Civil Space's portal launch, webinars, etc. After this awareness campaign and for the next 30 days, we will open the portal to receive applications.

Similar to what we have done with the City of Bristol, we will use Civil Space's platform to accept project applications from the citizens, businesses, and not-for-profits of the Town. We are also available to assist the applicants with questions they may have prior to submission of the project through the Civil Space project portal. We review the project data submitted through the portal and then evaluate the project allowability based on the specific sections of the ARP Act (Public Health/Negative Impacts, Premium Pay, Revenue Loss and Infrastructure Investments in Water/Sewer and Broadband). For those applications that are incomplete or need additional clarification prior to making the allowability determination, we reach out directly to the applicant to request additional information. This approach has effectively facilitated community outreach focused on equitable outcomes.

Should the need arise, we can work with you to develop additional community surveys that will be posted on the Town's website. The purpose of the surveys would be to further solicit constituents' recommendations for projects on which to spend the ARPA funds. As an example, we design surveys that prompt respondents to gauge how they would spend a hypothetical \$1,000 on various ARPA initiatives. Here's how it works. The participant is given a list of 10 to 12 initiatives on which they can spend a total of \$1,000. The money can be allocated to one initiative or spread among several. The initiatives listed are based on those outlined in the ARPA legislation, as well as stated strategic objectives expressed by Town officials. We then tabulate constituent priorities and communicate them to the Town.

A link to such a survey is included in an article below:



[Anne Arundel Asks for Community Input on ARPA Funds](#)



During this phase, we can also create additional outreach plan to assist non-profit and business applicants with developing eligible and viable projects/programs and then submitting application packages for funding.

Development of guiding principles

Once the Town has identified its stakeholder priorities for the ARPA projects, those priorities must be aligned with existing priorities. A critical component of this alignment is the creation of a “steering committee” to guide the Town’s ARPA activities. This committee should be chaired by a member of the Town’s senior management team and supported by executives in key programmatic areas such as public health, public safety, and public works. Consideration should also be given to representation from the key constituents (non-profit leaders, citizen group leaders, business leaders, etc.). We will confirm with you that the Town’s *ARPA Ad-hoc Committee* fulfills this function.

The committee should develop a set of guiding principles against which to evaluate any projects to be funded by ARPA. Here are some priorities that may be considered:

- Stakeholders’ perspectives
- Existing operating budget and capital budget initiatives
- Long-term strategic vision statements, equity statements, and other documents

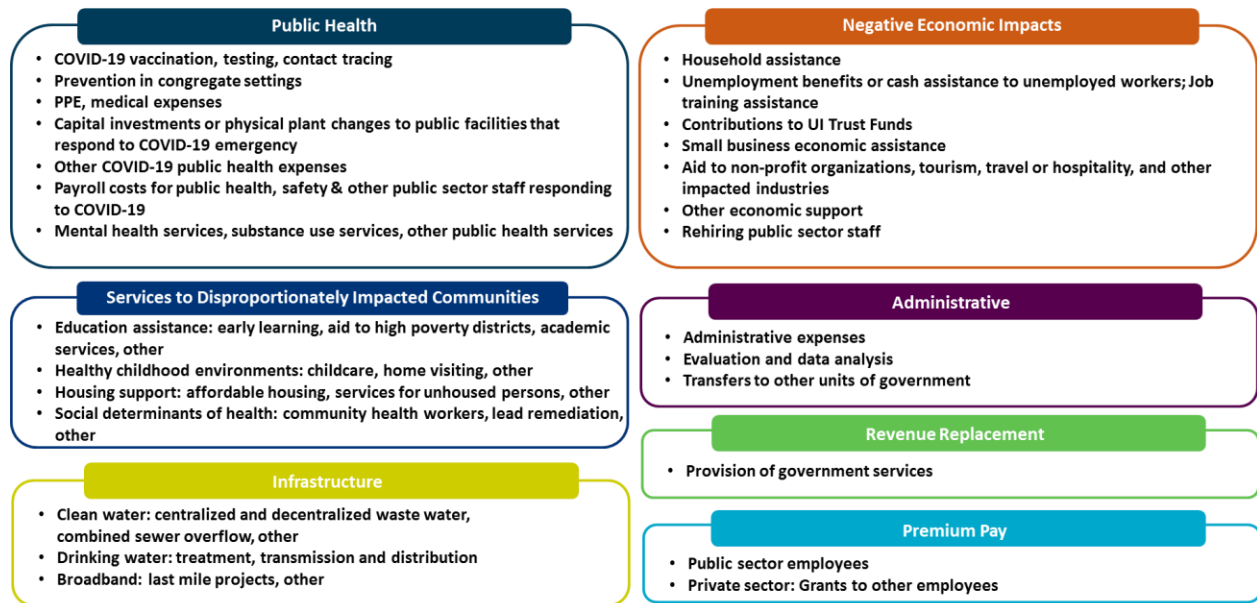
At the end, the committee should provide a document which will ensure that all internal and external stakeholders understand the criteria against which project applications will be evaluated.

Review of project applications

We will support the Town in its review and evaluation of the project applications. We first assess projects for allowability under ARPA. Our review will emphasize whether the project applications and all related project files indicate that the required data – equitable outcome measures, output measures, outcome measures, financial data, etc. – are being gathered and reported. We will also analyze the

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evaluation criteria the Town is using to ensure alignment with the fund structure and guiding principles previously discussed as well as the ARPA programmatic areas established by the Treasury as follows:



The following link demonstrates how we work with our clients to provide information to the public about ARPA project allowability, including a link to various webinars we have provided to the not-for-profit and business communities: [Public Transparency Webinars.](#)

We will make certain you don't spend time evaluating projects that are not allowed under ARPA. While we begin assessing projects submitted for ARPA allowability, **we recommend that the Town not adjudicate any of the projects submitted through the portal until all projects are submitted.** This approach allows the Town to focus on projects it knows are allowable rather than having to vet undesirable projects. We will provide regular status reports to the Town as we conduct our evaluation of projects.

Maintain a current library of guidance

As a consulting firm with a national state and local government professional services practice, we regularly monitor U.S. Congressional legislation and any implementation guidance produced by the various federal agencies. We will maintain a document detailing legislation and any additional guidance such as FAQs for each of the approved ARPA spending initiatives. The Town can rely on this document to determine the allowability of costs charged to that program. The U.S. Treasury has issued substantial enabling guidance under the CARES Act, but other federal agencies, such as Health and Human Services, Homeland Security, and the Department of Education, also issued substantial guidance in the form of FAQs. We will provide a thorough document to the Town detailing the impact of the FAQs on Town-approved spending initiatives and update the spending initiatives controlling document. We will continue to monitor not only the FAQ guidance issued by the Treasury, but also guidance issued by other federal agencies overseeing ARPA. This library will enable us to continuously share guidance documentation and interpretations of such guidance as it becomes available from ARPA funding entities. All such documents will be maintained on a Town website that is readily accessible.

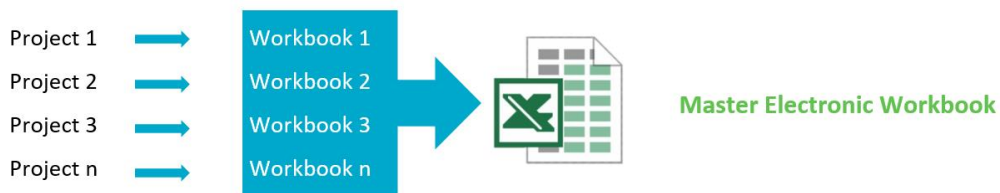
At this point, we will be ready to present the Town with a list of allowable projects for the committee’s approval. Once approved projects have been identified, goals, expected outcomes, and recovery impact need to be defined, documented, and presented for prioritization. Once prioritized, based on the Town’s guiding principles, the projects will be included in the strategic plan for implementation. It is crucial to continually track remaining funding available. We will keep a running total of the approved project total compared to the total ARPA funding available. We encourage the Town to develop, as part of its guiding principles discussed above, a timeline for spending ARPA funds. Since there are a number of years available in which to fund worthy projects, we recommend the committee be prudent in its project approvals. If the Town chooses to spend its funding rapidly, worthy late comer projects, especially those arising from the earlier projects that have been funded, can’t be funded.

In coordinating and assisting the Town with the management of deliverables with the U.S. Treasury, we will make sure that these data elements are included in the contracts so that there will not be any gaps in the data captured for project success and compliance. All contracts/agreements must contain all pertinent and required data elements including Key Performance Indicators (KPI) so that the downstream continuous monitoring and transparency processes are streamlined for meeting all reporting requirements in accordance with the U.S. Treasury department’s guiding principles.

For each project, we will assist the Town to gather the financial and non-financial performance indicators and record them, as appropriate, in the seven (7) programmatic areas described above. As part of our educational webinars for the proposers/applicants, we guide applicants to capture project financial and non-financial performance indicators that must be continuously monitored.

For disbursement of the award to the awardees, we will work with the Town to ensure that the contracts/grant agreements are prepared to ensure that (1) the vendor/grantee is contractually required to provide the relevant data necessary for the Town to submit to the U.S. Treasury and (2) the allowable amount is properly disbursed to the recipients.

Tracking project files – The Town must establish project files, so we will devise a systematic tracking mechanism of all ARPA projects to meet that need. This will include an electronic workbook that contains required data elements, such as recovery spending, performance, and outcome.



The master workbook would consolidate all individual project workbooks into one master file. Our current clients have found the master electronic workbook and our project assessment template effective in understanding the status of all their strategic ARPA programs and associated activities.

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This framework for the buildout of the workbook is as follows:

Sample Project Workbook

Project Name		City of X Project Y				
Identification Number		N/A				
Description of the Project: Agreement with the ABC, Inc., a nonprofit organization, to manage and administer the City's Coronavirus Relief Fund allocation for the purpose of distributing CARES Act funds to local community service providers.						
Description	Expenditure Category	Eligible Use Category	Funding Amount			Total Fund Amount
			6/1/2020	9/2/2020	Use Agreement, no date	
Staff Costs & Fringe	EC 2.2	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$
Outboard	EC 2.3	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$
Food Procurement	EC 2.3	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$
Administration	EC 2.3	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$
			\$ 0.00	\$ 0.00	\$ 0.00	\$

Use of Funds	
Please provide a description of the intended use of funds, strategies designed to ensure maximum program's impact and how it connects with the City's intended use of the funds. Please explain how the program objectives benefits the City on each of the following areas (select those that apply):	
Public Health (EC 2.3)	As relevant, describe how funds are being used to respond to COVID-19 and the broader health impacts of COVID-19 and the COVID-19 pandemic. Federal Funds to respond to emergency food assistance efforts throughout the City. Funds will be utilized to support food pantries and food assistance efforts through the City, with priority given to developing consistent food assistance coordination. Most of the funds were used to purchase food (dry, canned and produce) to supplement donated and government foods to support ACSO.
Negative Economic Impacts (EC 2.3)	As relevant, describe how funds are being used to respond to negative economic impacts of the COVID-19 public health emergency. Since COVID-19 began, we have seen food insecurity in our community increase and food donations decrease dramatically. Over 1,000 households per month, now we see approximately 22,000 households show up each month for food at our emergency food bank who have worked in the gig economy and do not receive unemployment benefits. (From Final Report to ACSO).
Services to Disproportionately Impacted Communities (EC 2.3)	As relevant, describe how funds are being used to provide services to communities disproportionately impacted by the COVID-19 pandemic.

Reporting Requirements	
The Recovery Plan must include key performance indicators for the major SLPPP funded projects undertaken by the recipient. The City has flexibility in terms of how this information is presented in the Recovery Plan, and may report key performance indicators for each project or non-grant projects with substantially similar goals and the same outcome measures. The initial report should include the key indicators above. Each annual report thereafter should include updated data for the performance period as well as prior period data, and a brief narrative adding any additional context to help the reader interpret the results and understand the any changes in performance indicators over time. To the extent possible, Treasury data encourages recipients to provide data disaggregated by race, ethnicity, gender, income, and other relevant factors.	
Required Performance Indicators and Programmatic Data:	While the City has discretion on the full suite of performance indicators to include, a number of mandatory performance indicators and programmatic data must be included. These are necessary to allow Treasury to conduct oversight as well as understand and aggregate program outcomes across recipients. This section provides an overview of the mandatory performance indicators and programmatic data. This information may be included in the City's Recovery Plan as they determine most appropriate, including combining with the section above, but this data will also need to be entered directly into the Treasury reporting portal. Below is a list of required data for each expenditure category.
Household Assistance (EC 2.2 & 2.3) and Housing Support (EC 3.10 & 3.12)	<ul style="list-style-type: none"> *Number of people or households receiving eviction prevention services (including legal representation) _____ *Number of affordable housing units preserved or developed _____
Negative Economic Impacts (EC 2.3)	<ul style="list-style-type: none"> *Number of workers enrolled in sectoral job training programs _____

Please see our sample workbook and project assessment template in the **Appendix**.

This will conclude our strategy phase which has entailed an assessment of the allowability followed by formal Town approval of the projects. Once all projects have been adjudicated and been awarded, monitoring and reporting will be ongoing through the end of the contract.

Continuous Monitoring

Once approved projects are in place and contracts with subrecipients have been established, the project financial and non-financial performance indicators must be continuously monitored. For each project, the Town must gather financial and non-financial performance indicators and record them, as appropriate, into seven (7) programmatic areas defined in ARPA.

During this phase, we will assess the Town's existing policies and procedures to ensure selected projects coincide with grant funding. We will also assist the Town by reviewing programmatic procedures for verification, allowed uses of ARPA funds, training, required documentation, eligibility of specific expenses to be covered by ARPA, and monitoring of subrecipients, including risk assessments and review of internal controls. As mentioned previously, through our library of guidance, we will continuously monitor and ensure compliance with all upcoming regulatory and accounting guidance.

Given our existing working relationship with Tyler Technologies, while not directly asked by the Town, we can show you how Tyler's Enterprise Data Platform and Recovery Insights as a solution has the capability to fulfil the grants and data management requirements. Their solution focuses on awareness, targeted interventions, and equity in recovery. Tyler's Socrata enterprise data platform:

- Facilitates and develops management reports on the status of the grant program
- Provides cash management reports showing the projected schedule for reimbursement request and the actual status of the drawdown
- Solicits, manages, and tracks program outcomes
- Develops database/electronic systems for tracking and managing project worksheets, claims, and grant applications and status

In addition, the solution provides census-tract level proprietary economic data on foot traffic at businesses and public places, business revenues, and consumer consumption. This granular data – unavailable from any public source – can be used to track outcomes of economic recovery programs funded by ARPA. The solution makes this proprietary economic data accessible and intelligible to key internal stakeholders by presenting it in a pre-configured dashboard, complete with geospatial and

graphical visualizations: critical performance indicators needed to track government economic and fiscal recovery. Moreover, if the Town provides data on grant program status, the solution can include a metric on grant program status in the dashboard that can be easily accessed and analyzed by the Town’s stakeholders.

Below please find some examples via the links showcasing how Tyler clients are using the solution for CARES/ARPA:

- [State of Iowa](#)
- [Pittsburgh, PA](#)
- [Fulton County](#)
- [Cook County, IL](#)
- [Pierce County, WA](#)
- [Nassau County, NY](#)
- [Ramsey County, MN](#)

Please refer to the **Appendix** for more information.

In order to perform continuous monitoring, we will perform the following main activities:

Monitor transactions reported in the Town’s General Ledger – Once the projects are approved, the Town must establish appropriate cost centers in the financial system. Going forward, we assume Town personnel are recording all ARPA transactions accordingly. It is important to ensure that such ARPA funding is properly controlled as well as compliant with ARPA regulations. We will review Town internal control policies and cost center taxonomy for compliance with reporting requirements previously outlined. We will perform a “pre-audit” by inspecting and verifying transaction documentation to verify each transaction has been properly processed in accordance with established policies and procedures and is allowable under ARPA regulations. Performing this pre-audit will prevent future audit risks.

We will use the pre-audited cost center data to assist the Town in preparing monthly reports for each of the approved ARPA projects. Each of these reports will be reconciled to the Town’s General Ledger system (Tyler Munis) on a monthly basis, to ensure that all costs are being accounted for, tracked and reported accurately, and made available for the independent auditors, should the program be selected for the Uniform Grant Guidance audit.

All reports will be provided to the appropriate Town official for approval before submission to the U.S. Treasury, and we will be available to meet with Town officials to address any questions they might have about the monthly report. We will heavily coordinate and assist the Town’s Finance Office to ensure timeliness and accuracy of all reports.

Monitor non-financial indicators – Under ARPA, there is a tremendous volume of non-financial KPIs that must be gathered. We will ensure the required KPIs are collected, and the information is reliable. We will then provide all KPI information to the Town in an approved format.

Monitor grantees and business incentive recipients – A subrecipient is a non-Town entity that receives a subaward from the Town, such as a business or not-for-profit, to carry out Town ARPA projects. We will conduct monitoring of subrecipients in accordance with the Uniform Grant Guidance requirements (2 CFR 200). Using that guidance, we will assist the Town to perform a risk assessment of its subrecipients. If a subrecipient is high risk, we will assist the Town in conducting virtual or in person audits. The focus of these audits will be whether the data supplied by the grantee is properly supported by the books and records and whether the grantee has internal control processes in place so that the Town can rely on the data provided. For moderate risk grantees, we will assist the Town in performing “desk audits” which consists

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primarily of analytical procedures. A limited review consisting of reasonableness tests will be conducted for low risk grantees.

Monitoring business incentive recipients depends on the structure of the project. We will assist the Town with its review of any business incentive eligibility documentation. If the business must certify certain aspects of its performance as a condition of using the funds – for instance, hiring a certain number of employees back to work – we will assist the Town in monitoring whether the business has complied with these requirements. Monitoring both financial and non-financial performance indicators is critical to data integrity.

During this phase, we will work with third party ARPA grant fund recipients to ensure they designed and implemented sound internal controls which are needed to assess federal eligibility requirements. Upon the conclusion of our internal control monitoring visit, we will document our findings and identify expenditures that do not meet the federal eligibility requirements. Finally, we will recommend remediation actions to be taken by the fund recipients, if applicable. This will ensure that subrecipients provide procurement and expenditure reports that are in compliance with ARPA.

These activities will position the Town well-prepared for the required transparency and reporting to the appropriate parties.

Transparency

In our view, there are four important parties that require reporting transparency: *The First Selectman, The Board of Selectmen, your Constituents, and the Federal Government*. We will continuously keep these stakeholders informed and aware of grant activities. There will be a high degree of scrutiny on performance, both financial and non-financial, of all authorized projects.

We will assist the Town in determining eligibility and allowable costs for payments requested from various Town program administrators. The following process will help to ensure the various funded projects are allowed and reimbursable under ARPA:

- Projects funded will report the required financial and non-financial data.
- Projects are set up under a standard taxonomy so that the data is reported consistently in the General Ledger
- Projects are continuously monitored to ensure payments are authorized, documented, and recorded properly in the General Ledger.
- Reporting is accurate and reflects the true state of each project.

As stated previously, select groups are interested in transparency. Below is a description of information each may need:

The First Selectman – In order to maximize the ARPA funding usage, we will prepare and design reports that will identify the following, by ARPA program:

- Total ARPA funding awarded,
- Expenditures charged to date,
- Planned spending in the future and
- Funding remaining after actual and planned spending is accounted for.

A meaningful analysis of planned future spending is key. We will work closely with Town programmatic and budget/accounting personnel to leverage existing processes. We will meet with those responsible for developing future spending plans to ensure the plans are based on existing documentation, such as a contract, purchase orders, etc. The goal is to avoid the risk that these plans become merely a “plug” to demonstrate that all funding will be used, without any specific provision on how it will be spent in the future. If it appears there will still be ARPA funding available in the program, we will work with program managers to identify: (1) any prior spending which may have been charged to other sources but should be charged to ARPA funding and (2) any potential future spending which could be accelerated by charging to ARPA.

Prior spending may also be identified through the use of data analysis tools which will help to identify expenditures that should be considered for ARPA funding. We will provide written recommendations if any such changes to spending plans or prior spending amounts need to be made.

The Board of Selectmen

We will assist the Town to develop periodic reports for the Board so that they can exercise oversight responsibilities. We believe these reports should present aggregated data, by project, demonstrating the progress, both financially and non-financially. Recommendations for changes to project funding should accompany this report to the Board.

Constituents

Similar data provided to the Board should also be published on Town’s website to demonstrate to its constituents that spending is prudent and for the intended purpose. We will work with the Town to identify a meaningful method of providing such information clearly to the public.

U.S. Treasury and other governmental entities

As a non-entitlement unit (NEU), you are only required to submit an annual project and expenditure report. These annual reports will be the aggregation of individual project level data. Each project will need to report the following:

Expenditures: The recipient must be able to report on the project’s obligations and expenditures.

- Current period obligation
- Cumulative obligation
- Current period expenditure
- Cumulative expenditure

Project Status: The recipient must report on project status for each reporting period, in four categories:

- Not started
- Completed less than 50 percent
- Completed 50 percent or more
- Completed

The aggregated project level data will be presented in the seven ARPA programmatic categories.

Our workplan leverages your already established internal controls. We assume, unless otherwise demonstrated, that the Town’s internal control over financial reporting is an effective and efficient. We will work with all appropriate Town departments to prepare and coordinate continuously to meet the deadlines for all reporting.

Monthly, subsequent to disbursement, we will select a relevant sample of transactions to “pre-audit” for compliance and reconciliation. This will be accomplished one month in arrears. For example, July transactions will be pre-audited by the end of August. Finally, we will

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prepare the required management, Board of Aldermen, constituent, and federal and state/local government reports by the end of the following month. In short, our milestones will be incorporated into your already functioning internal control processes.

Close-out

As part of our standard close-out process, we will establish and maintain documentation for auditing and grant close-out purposes. Our process entails the following:

- If a grantee project requires a closeout audit, we will inquire, observe, and inspect each grantee to determine whether they maintained project-specific level expenditures in the General Ledger.
- We will select a sample of expenditures to inspect in order to confirm whether such expenditures have been made in accordance with applicable laws and regulations.

In conclusion, the following illustration provides a holistic view of our process throughout the life cycle of ARPA fund management.



UHY will maintain feedback tools implemented in the early stage of the community engagement solicitation and feedback through the Town website and continue producing data and analytics reporting on the feedback received. In addition, we will retain all operational working records and reports for a minimum of five (5) years beyond the expiration of the contract, following which such records will be turned over to the Town. We will make such operational working records and reports available, during the term of the contract and for five (5) years beyond the expiration of the contract.

ENGAGEMENT PROJECT MANAGEMENT

In executing all our engagements, we have developed a project management program that can be customized to meet the needs of the Town. Our project management plan is created in adherence with the industry best practices, outlined in The Project Management Body of Knowledge (PMBOK). The Project Management Body of Knowledge is published by the Project Management Institute (PMI), and presents a set of standard guidelines for project management. It provides a disciplined approach to effectively manage a project on time and within budget, achieving project objectives and intended benefits. Throughout the project, in addition to establishing project governance and stakeholder communication, the scope, budget, schedule, cost, resource, quality, risks, and issues, are managed, measured, communicated, and reported on. Part of this project management plan involves:

Assembling a team that has a combination of the appropriate knowledge and experience relevant to the Town’s needs.

Resources entering time spent working the previous day, by engagement to track against the budget and estimate time to completion.



Managing agreed-upon scope of work to effectively deliver results on time and within budget to meet the Town’s requirements.

Developing a budget for each engagement to guide the activities executed by the assigned personnel to finish on time & on budget.

Our project management process provides personal attention and direct involvement from partner to staff in all stages of the engagement to ensure the prompt resolution of potential risks and issues. It allows us to serve our clients effectively by maintaining a strong and firm commitment to implement quality in every engagement.

The pandemic has demonstrated that professional services such as those contemplated by the Town can be effectively and efficiently delivered in a virtual environment. Much of the work associated with grants management oversight, and specifically ARPA administration, can be delivered virtually. Given the proximity of our local office, if the Town requires us to be physically on-site, we have the ability to be present on-site.

ENGAGEMENT COMMUNICATION PROCESS

Depending on the restrictions in force during the time of this engagement, your team may not be allowed to have the traditional “face to face” interaction. In such case, we will use technology and virtual platforms such as Zoom, GoToMeeting, or similar video conferencing technology, to hold such meetings. We will conduct our kick-off session, status meetings, and other meetings virtually unless restrictions are lifted. We believe that these meetings are critical to the appropriate execution of the scope of this work, and we will

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continue to hold them, just in a different manner. We also plan to use a software product called Suralink to facilitate document transfer. Suralink operates using a secure file transfer protocol so we can upload all documents safely. Only invited users will be able to upload and download documents. We will automatically track uploaded documents and report out the status of all items to both the Town and UHY. This will also allow us to manage who can access the data submitted for the review and thereby ensure that it is transmitted and maintained securely. We will also monitor the status of outstanding requests to keep the project on time and on budget. In any event, we will follow the Town's protocols during the entirety of the engagement.

CAPACITY TO SERVE

With our internal capabilities and years of experience, we have the capacity to serve governmental organizations with distinction through the support of our National Government Practice. The professional services UHY provides to governmental organizations at the state and local level is an important and significant portion of our accounting, auditing, and consulting practice. We have a designated group of professionals dedicated to government and not-for-profit accounting, auditing and consulting services. This combination of diverse skills and knowledge will provide the Town with premium accounting and auditing services and adequate bench strength to meet the needs of the Town on a timely basis.

As a national professional services firm with over 1,000 employees, we are performing numerous engagements collectively worth millions of dollars across the United States. Specifically, we have been engaged to perform American Rescue Plan Act consulting and management services for numerous municipalities.

Because we are a national professional services firm, we have the resources to be able to complete this project within your required timeframe. We have established an ARPA team who is well-versed in ARPA requirements and is currently providing similar services to other ARPA clients.

2. A detailed work program and time schedule for each phase of the project, including milestones for periodic review of the work with the First Selectman and the ARPA Ad-hoc Committee.

2. DETAILED WORK PLAN & TIMELINE

The following describes our work plan and time schedule for each phase, i.e., strategy, monitoring as a continuous process throughout our engagement, and reporting milestones based on U.S. Treasury's due dates. We will meet with the First Selectman and the ARPA Ad-hoc Committee for periodic review, however, we are flexible in the frequency of meetings based on the Town's needs.

STRATEGY PHASE

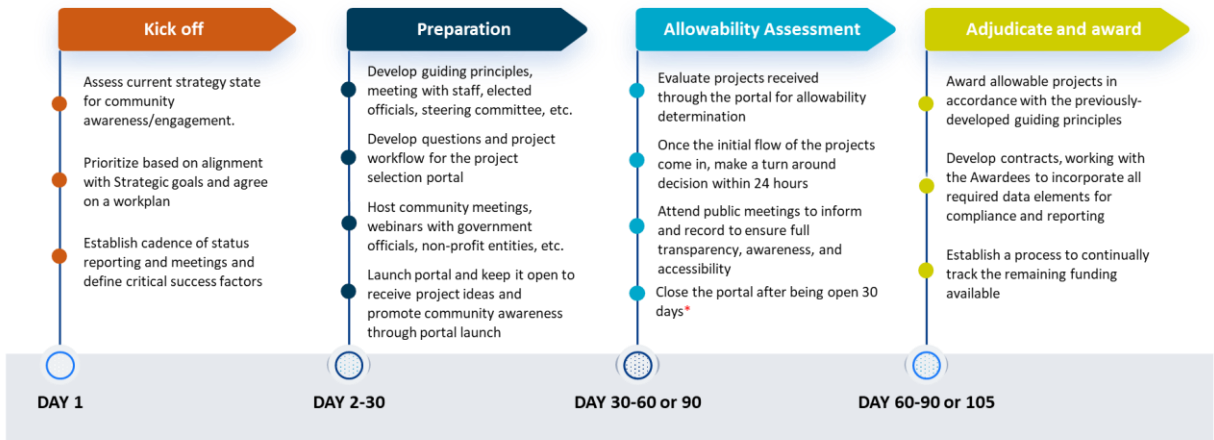
Depending on the assessment of your existing efforts and your needs, the Preparation stage of our comprehensive plan, below, may or may not be needed. Based on the information on your website and the Pre-proposal presentation on January 18th, it is our understanding that the selected vendor will start with the Allowability Assessment stage of the applications you have already received.

Subject to change based on Town's schedule

Feb 01, 2022- May 15, 2022

Strategy Work Plan

Alignment of appropriate uses of ARPA funding with long-term strategic objectives



* We recommend that the awarding authority does not adjudicate any of the projects submitted through the portal until all projects are in.

- Maintain a current library of guidance containing all applicable legislation, regulations, policies, and rules
- Gather and document lessons learned, communicate through quarterly webinars and meetings
- Provide regular status reports to the awarding authority as we conduct our evaluation of projects

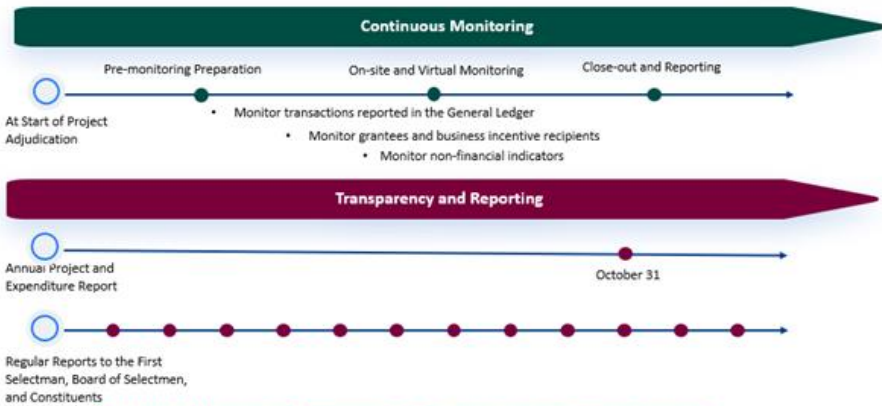
CONTINUOUS MONITORING, TRANSPARENCY, AND REPORTING PHASE

Subject to change based on Town's schedule

May 15, 2022- Dec 31, 2022

Monitoring and Reporting Work Plan

Continuous monitoring and reporting and transparency with all stakeholders and constituents



Both Continuous Monitoring and Transparency/Reporting phases continue until contract expiration.

- Maximize the use of ARPA fund and ensure equitable outcomes
- Minimize the risk of "claw back" by the federal government
- Streamline processes for continued effective and efficient grants administration, compliance, and reporting

We anticipate the project will enter an ongoing monitoring and reporting phase by mid-year 2022. As a result, we are confident that we can assist the Town in expending the fund by November 2023 ahead of the U.S. Treasury's deadline of December 31, 2024. We stand ready, should the Town decide to extend the target completion date of November 2023.

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3. A list of personnel who will be assigned to the project, including resumes for professionals expected to provide at least 20% of the person hours on the project. Support staff contracted by your firm for this project should additionally be included for review and consideration. List shall include alternate lead person in the absence of the assigned lead person, or methodology for providing continuity of services due to temporary absence of the lead person.

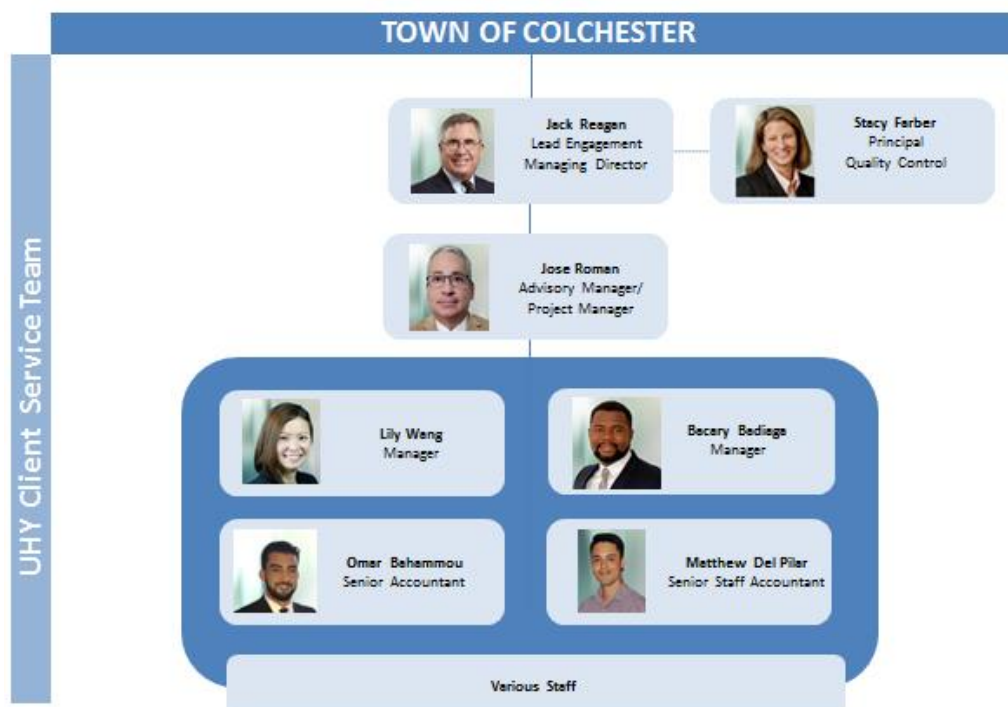
3. KEY PERSONNEL ROLES & STAFFING

UHY has a strong commitment to maintaining continuity among client engagements. We believe that understanding your organization and continuity of key personnel is essential to delivering the highest level of service. As a firm, we are committed to low engagement team turnover for all of our clients. The strong growth of UHY has provided opportunities of professional growth for our staff, and we have enjoyed low staff turnover in comparison to the industry average. This has allowed us to provide consistent staffing over time. Core members of our practice have been with the firm for many years, which allows us a unique advantage.

All of our professionals are required by the firm to complete all the requirements of Government Auditing Standards continuing professional education regulations. In addition, an in-house series of programs on current developments in the auditing, accounting, and tax areas serve to keep all staff members up to date on the latest available professional literature.

To ensure the right mix of expertise, we have assembled a select, specialized team to serve on this engagement. Our team includes a Managing Director and senior level professionals who will ensure that our services are efficiently provided when working with the Town. Your UHY team will keep communication open all year long, not just during the engagement. Each member has experience working with similar entities to the Town. This dedicated group of professionals will work closely together to ensure that our services are conducted as smoothly as possible and according to the Town’s timetable. We have provided short biographies on the next few pages and full resumes in the **Appendix** for these individuals.

ORGANIZATIONAL CHART



YOUR TEAM

UHY has selected Jack Reagan as your Engagement Managing Director and Single Point of Contact. Below the Town will find more information regarding Jack's qualifications and professional experience.



JACK REAGAN
MANAGING
DIRECTOR / SINGLE
POINT OF CONTACT

Jack is a leader in the Audit and Assurance Department and the leader of the firm's National Government Practice with an impressive professional career of over 30 years serving large and small local governments, both locally and nationally. He has extensive CARES Act and COVID-19 relief fund experience and developed a robust approach for his clients that together with community engagement teaming partnerships have helped his clients successfully manage their ARPA funds.

ARPA Clients Served

Anne Arundel County, MD	City of Detroit, MI
Cass County, MO	City of Bristol, CT
City of Wilmington, DE	City of Chelsea, MA
Town of Wallingford, CT	City of Chattanooga, TN
City of Chester, PA	

Jack's expertise lies in the areas of local government administration, grants management, crisis response management and recovery, FEMA, strategic planning, and policy development and implementation. He has worked closely with Thompson Grants, a leading provider of grants management information, to present webinars on a wide range of grants management topics.

Other Relevant Clients Served

District of Columbia	West Haven, CT
City of Alexandria, VA	Boston, MA
Montgomery County, MD	Hillsborough County, FL

Jack has recently been appointed to UHY LLP's Management Committee. Jack is an active presenter on governmental accounting and auditing issues, having presented to the Maryland Society of CPAs government day on numerous occasions as well as various state of Maryland CPA chapters. He is a Certified Public Accountant and a Certified Internal Controls Auditor.

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of service*



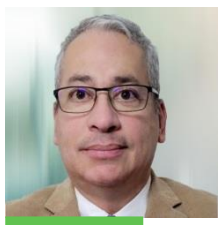
STACY FARBER
PRINCIPAL/QUALITY
CONTROL

Stacy is a Principal in our Connecticut practice who brings over 23 years of experience in financial leadership to her engagements. She specializes in financial decision making and company-wide policy development to overcome operational issues and drive proactive improvements. She provides advisory consulting services to closely-held businesses, performing compilations, reviews and audits for clients in the various industries. Stacy works with Jack on other similar ARPA engagements.

ARPA Clients Served

Town of Wallingford, CT City of Bristol, CT
City of Chelsea, MA

Stacy is a licensed Certified Public Accountant in the state of Connecticut. She received a BS in Financial Accounting from Bryant University.



JOSE ROMAN
ADVISORY
MANAGER

Jose Roman will support Jack in executing the engagement and supervising the staff on the engagement. Jose is an Advisory Manager who brings over 20 years of experience as a consultant. He brings extensive international working experience in Latin America and Canada as an Internal Auditor, compliance, risk and SOX Manager. Jose brings COVID-19 relief fund experience working alongside Jack Reagan on similar ARPA fund management engagements.

ARPA Clients Served

Anne Arundel County, MD City of Bristol, CT
City of Wilmington, DE City of Chelsea, MA
Cass County, MO Town of Wallingford, CT
City of Chester, PA

In this role, he assists in executing the client's ARPA strategy, continuously monitoring ARPA funded project expenditures, and transparently reporting the results of the ARPA spending to all relevant constituents, including the federal government. Jose is in the process of pursuing CPE credit to reactivate his CPA license. Jose received a Bachelor of Science in Accounting from InterAmerican University of Puerto Rico. He is fluent in Spanish.



**BACARY
BADIAGA**
MANAGER

Bacary Badiaga will support Jack in executing the engagement and supervising the staff on the engagement. Bacary is a Manager and a member of the Audit and Assurance department. He has over five years of experience in the audit of large state and local governments and not-for-profits. He brings CARES Act and ARPA fund management experience from the engagement for Anne Arundel County, MD where he is assisting management in establishing their guiding principles for use of its ARPA funding. Further, he is actively monitoring the spending on approved projects. In addition, he helped several government clients improve their financial reporting and internal controls.

Relevant Clients Served

Anne Arundel County, MD Maryland Dept. of Transportation
District of Columbia

Bacary is a Certified Public Accountant and received a Bachelor of Science in Accounting from University of Baltimore.



LILY WANG
MANAGER

Lily Wang will support the team in executing the engagement and supervising the staff on the engagement. Lily is a Manager in our Audit and Assurance Department. With more than five years of accounting and auditing experience, she has assisted clients in the government and non-profit industries. Her work has included some large local governments (including CARES Act experience) and SEC-11K clients and she brings experience with employee benefit plan audits.

Relevant Clients Served

District of Columbia

Lily is a Certified Public Accountant and is fluent in Mandarin. She received a Master of Science in Accounting and Business Advisory Services from Towson University and a Bachelor of Science in Accounting and Finance from University of Maryland.

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**OMAR
BAHAMMOU**
SENIOR
ACCOUNTANT

Omar Bahammou will perform detailed procedures as described in our approach and will provide direct supervision of staff accountants. Omar is a Senior Accountant and a member of the Audit and Assurance department. He provides attestation and assurance services to organizations in a variety of industries, including state and local governments and not-for-profits, including auditing various CARES Act programs. His previous experience includes working in the audit department of the International Relief and Development, Inc., headquartered in Arlington, VA.

Relevant Clients Served

District of Columbia

Omar received a Master of Science in Accounting from Stratford University and a Master of Accounting, Auditing and Management Control from University of South Brittany, France.



**MATTHEW
DEL PILAR**
SENIOR STAFF
ACCOUNTANT

Matthew Del Pilar will perform detailed procedures as described in our approach and will provide direct supervision of staff accountants. Matthew is a Senior Staff Accountant and a member of the Audit and Assurance Department. He brings several years of auditing experience in Single Audit, employee benefit plans and agreed-upon procedures. He conducts financial audits and Single Audits as defined by Compliance Supplement (including CARES Act programs), audit client's engagement history, and planned audit approach.

Relevant Clients Served

District of Columbia

Matthew received a Bachelor of Science in Accounting from Towson University.

We estimate that the engagement managing director and principal will spend 10% of the total engagement hours, our managers will spend 20% of the total engagement hours, senior accountants will spend 30% of the total engagement hours and staff accountants will spend 40% of total engagement hours.

COMMITMENTS AND STAFF CONTINUITY

UHY has a strong commitment to maintaining continuity among client engagements. We believe that understanding your organization and continuity of key personnel is essential to delivering the highest level of service. As a firm, we are committed to low engagement team turnover for all of our clients. The strong growth of UHY has provided opportunity for professional growth for our staff, and we have enjoyed a low staff turnover in comparison to the industry average. This has allowed us to provide consistent staffing over time. Core members of our practice have been with the firm for many years, which allows us a unique advantage.

Staff continuity is of major importance to us. We will do our best to ensure staff continuity to deliver the best value to the Town. In the event that we experience any attrition of our engagement staff, those members will be replaced by equally capable and experienced auditors.

In the event of a lead person's absence, we will assign Stacy Farber, a principal in our Farmington practice. She has extensive background in serving government entities through her work with municipalities.

4. A description of similar projects which your firm has been involved in, including references.

4. DESCRIPTION OF SIMILAR PROJECTS & REFERENCES

UHY'S NATIONAL GOVERNMENT PRACTICE

Our firm's National Government Practice is a well-recognized group of professionals with vast experience in the unique requirements of its governmental clients. Nationally, we have audited numerous governments that participate in the Government Finance Officers Association's (GFOA) Certificate of Achievement for Excellence in Financial Reporting program. Jack Reagan, the Engagement Managing Director, is a reviewer for this important GFOA program. Further, Jack is also a member of the Association of School Business Officials (ASBO) International, and he has previously been a reviewer in their Certificate of Achievement for Excellence in Financial Reporting Program. UHY has performed numerous audits of organizations subject to financial and compliance audits. These audits were performed under auditing standards generally accepted in the United States, Government Auditing Standards, Uniform Guidance (formerly known as OMB Circular A-133), and its Compliance Supplement (when applicable), Office of the State Controller's Minimum Audit Requirements and Reporting Guidelines. UHY is a member of the AICPA Governmental Audit Quality Center and has demonstrated our commitment to audit quality, including those performed under Government Auditing Standards and Uniform Guidance.

UNIFORM GUIDANCE EXPERIENCE

Our firm has audited more than a billion dollars in federal expenditures and has been the designated contracted firm providing subrecipient monitoring for a top ten (10) City in the United States. Our proposed engagement team is uniquely experienced in Single Audits and federal grant monitoring. Our team members have in-depth experience with the Federal Emergency Management Agency (FEMA) disaster recovery federal grant and reimbursement programs, and other state and federal reimbursement grants. We also have significant experience administering other federal and state grants and regularly conducting independent Single Audits of recipients of FEMA funds and other federal grant programs. All of our Single Audit work involves testing for waste, fraud, and abuse. As such, in all our current ARPA engagements, we work to identify potential waste, fraud, and abuse; while performing oversight of disbursement and tracking of federal funds by state or federal agencies. All team members have Uniform Guidance experience. Further, your proposed team is one of the few teams in the U.S. that has current experience with administering and reporting on ARPA funding.

The next level
of service

Below is a list of audit and consulting local government clients:

- Albany Convention Center Authority (NY)
- Albany Port District Commission (NY)
- Algonac (MI)
- American Association of Colleges of Pediatric Medicine (Washington, DC)
- AMVETS National Service Foundation (Lanham, MD)
- AMVETS Charities (Lanham, MD)
- Anne Arundel County (MD)
- Baltimore County Public School System (Towson, MD)
- Bloomfield Hills Township (MI)
- Board of Education of Caroline County (MD)
- Board of Education of Dorchester County (MD)
- Board of Education of Kent County (MD)
- Board of Education of Queen Anne’s County (MD)
- Board of Education of Somerset County (MD)
- Board of Education of Talbot County (MD)
- Board of Education of Wicomico County (MD)
- Board of Education of Worcester County (MD)
- Bristol County (CT)
- Calhoun County (MI)
- California State Teachers’ Retirement System (CalSTRS) (CA)
- Capital District Regional OTB (NY)
- Capital District Regional Planning Commission (NY)
- Caroline County (MD)
- Cass County (MO)
- City of Albany (NY)
- City of Benton Harbor (MI)
- City of Bristol (CT)
- City of Chattanooga (TN)
- City of Chester (PA)
- City of Detroit (MI)
- City of Ecorse (MI)
- City of Hazel Park (MI)
- City of Inkster (MI)
- City of River Rouge (MI)
- City of Waterford (MI)
- City of Watervliet (NY)
- City of Wayne (MI)
- City of Wilmington (DE)
- Columbia Downtown Housing Corporation (Columbia, MD)
- Congressional Institute (Alexandria, VA)
- County of Schenectady (NY)
- Croswell (MI)
- Delaware Rural Water Association (DE)
- Dorchester County (MD)
- Durand (MI)
- Eaton County (MI)
- Flexible Packaging Association (Annapolis, MD)
- GM RACER Trust/U.S. Treasury (MI)
- Greater Detroit Resource Recovery Authority (MI)
- Home Purchase Assistance Program Fund (MD)
- Howard County Conservancy (Woodstock, MD)
- Howard County Lacrosse Program (Columbia, MD)
- Howard County Maryland Economic Development Authority (MI)
- Independence Township (MI)
- Ingham County (MI)
- International Eye Foundation (Kensington, MD)
- Isabella County (MI)
- Lapeer County (MI)
- Los Angeles Unified School District (CA)
- Mackinac County (MI)
- Maryland Coalition of Families (Columbia, MD)
- Maryland Racing Commission (MD)
- Maryland University of Integrative Health (Laurel, MD)
- Marysville (MI)

- Memphis (MI)
- Metro (formerly Bi-State Transit) (MO)
- National Association of Workforce Boards (Washington, DC)
- New York Convention Center Operating Corporation (NY)
- New York Independent System Operator, Inc. (NY)
- New York State Archives Partnership Trust (NY)
- Plymouth (MI)
- Pontiac Housing Commission (MI)
- Pontiac School District (MI)
- Queen Anne’s County (MD)
- Royal Oak Township (MI)
- Sandusky (MI)
- Society for Women's Health Research (Washington, DC)
- South Bay Regional Public Communications Authority (MI)
- Southeastern Michigan Regional Energy Office (MI)
- St. Clair (MI)
- St. Clair County (MI)
- State of Michigan
- Somerset County (MD)
- Sustainable Development Institute (Washington, DC)
- Swartz Creek (MI)
- Talbot County (MD)
- Town of Bethany Beach (DE)
- Town of Greensboro (MD)
- Town of Oxford (MD)
- Town of Ridgely (MD)
- Town of Wallingford (CT)
- Tuscola County (MI)
- Washington, D.C.
 - E911/311 Fund
 - Highway Trust Fund Home Purchase Assistance Program Fund
 - Lottery
 - Health Benefits Exchange Authority
 - Other Post Employment Benefit Fund
 - Unemployment Compensation Fund
 - University of the District of Columbia
 - Not for Profit Hospital Corporation
 - Washington Convention and Sports Authority
- Women's Law Center of Maryland (Towson, MD)
- Worcester County (MD)
- World Federation for Ultrasound in Medicine (Laurel, MD)
- Yale (MI)

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of service*

ARPA EXPERIENCE

As a demonstration of our qualifications for conducting consulting and compliance engagements with local governments, we have recently won the following engagements to assist localities in administering their American Rescue Plan Act (ARPA) funding:

Client	ARPA Value	Length of Engagement
City of Detroit, MI	\$825M	2021 - present
Anne Arundel County, MD	\$113M	2021 - present
City of Wilmington, DE	\$55M	2021 - present
City of Chelsea, MA	\$40M	2021 - present
City of Chattanooga, TN	\$38M	2021 - present
City of Chester, PA	\$30M	2021 - present
City of Bristol, CT	\$29M	2021 - present
Cass County, MO	\$20M	2021 - present
Town of Wallingford, CT	\$13M	2021 - present

On the next several pages, we provide a detailed description of engagements that require experience and technical competencies similar to the scope of work outlined in your RFP.

Client Name:	City of Bristol, CT
Nature of Work:	<p>We are providing the City with programming assistance including:</p> <ul style="list-style-type: none"> • Support the task force and its subcommittees pertinent to the development of a funding distribution plan, including grant distributions and/or incentives • Support task force with development of use and administration guidelines for projects, eligible programs and incentives • Create an overall schedule that includes implementation of individual project/program components. • Relevant to programs and incentives, assist in developing guidelines for distribution of funding. • Develop compliance procedures inclusive of compliance testing of grantees. • Create a marketing and communications outreach plan to assist non-profit and business applicants with development of eligible projects/programs and submission of ARPA eligible funding applications. • Provide appropriate reports, support City staff and attend meetings as required to provide information required by city boards, departments and task force as applicable. • Provide budget management and reporting of American Rescue Plan funds coordinating with the City Comptroller's Office and financial reporting system. Reconcile with the City's general ledger system (Tyler Munis) on not less than a monthly basis, to ensure that all costs are being accounted for, tracked and reported accurately. Assist with and provide information required for Treasury interim and quarterly reporting. • Prepare and issue a final close-out report to the City and to the Treasury Department, including a financial reconciliation.
Start and End Date:	2021 - present

The next level
of service

Client Name:	City of Chelsea, MA
Nature of Work:	<p>We are providing the City with assistance in two (2) phases, which may occur concurrently or sequentially, as determined by the City:</p> <p>In Phase I, UHY is performing the following:</p> <ul style="list-style-type: none"> • Confirm the SLRF and ARPA reporting schedule and what is required to be reported. • Prepare, adopt and submit an Internal Control Plan SLFRF Fund in compliance with Section 6029C) of the Act, IFR, and the Uniform Admin. Requirements, Cost Principles, and Audit Requirements for Federal Awards. • Calculate lost revenue beginning with the last full fiscal year prior to COVID-19 public health emergency in accord with Guidance on Recipient Compliance and Reporting Guidance issued by the Dept. of Treasury June 17, 2021. <p>In Phase II, UHY is defining processes/systems for projects to approve and track expenditures and related compliance support for reporting in accordance with ARPA guidance provided in accord with Guidance on Recipient Compliance and Reporting Guidance issued by the Dept. of Treasury June 17, 2021.</p> <p>UHY is also prepared to support additional phases based on the City's requirement. These additional phases include the following:</p> <ul style="list-style-type: none"> • Design record keeping / documentation and reporting requirements to align with multi-year ARPA initiative and SLFRF through December, 2024 (encumbrance) and December, 2026 (for expenditure). • Training of Audit/Finance staff to instruct them on the processes and reporting requirements Guidance on Recipient Compliance and Reporting Guidance issued by the Dept. of Treasury June 17, 2021.
Start and End Date:	2021 - present

Client Name:	City of Chester, PA
Nature of Work:	<p>UHY is currently assisting the City in meeting all compliance and reporting guidelines for ARPA and Coronavirus State and Local Fiscal Recovery Fund (CSLFRF) and assisting the City and its subrecipients in data gathering for submission to the U.S. Treasury Department.</p> <p>The main activities entail:</p> <ul style="list-style-type: none"> • Helping the City meet all compliance and reporting guidelines associated with ARPA and CSLFRF, including assistance in filing quarterly reports with the Treasury Department • Working with City officials to gather data to be submitted to the United States Treasury Department • Working with any subrecipients to gather data to be submitted to the United States Treasury Department.
Start and End Date:	2021 - present

Client Name:	Anne Arundel County, MD
Nature of Work:	<p>We are currently working with a large county in Maryland, Anne Arundel County, to assist them in the management and monitoring of their approximate \$113 million ARPA funds. The scope of our work on this engagement, which commenced in June 2021, is as follows:</p> <ul style="list-style-type: none"> • Consult with the County oversight group on proposed uses of the ARPA funds to ensure proposed uses are consistent with the purposes allowed by the ARPA and related guidance issued by the U.S. Treasury. Keep a record of approved spending initiatives. • Review and validate actual County spending of the ARPA funding to ensure the spending is consistent with both the purposes approved by the County oversight group and the purposes allowed by the ARPA and related guidance issued by the U. S. Treasury. • Coordinate with two (2) accountants in the County’s Office of Finance to complete moves of expenditures to and from the designated ARPA cost centers to place expenditures for proper ARPA purposes in the cost centers and remove any expenditures for non-ARPA purposes from the cost centers. • Ultimately ensure validated ARPA expenditures are recorded in the designated cost centers on the County’s ledger so that the total spending of the ARPA funds shall be tracked and reported separately from other County spending. • Using the expenditures posted to the ARPA cost centers, prepare regular reports of the ARPA expenditures in accordance with the required format specified by the U. S. Treasury. Such reports shall follow the U.S. Treasury reporting requirements until December 31, 2024, and will be approved by a named County official before the filing of the reports with the U.S. Treasury. • Prepare monthly reports of total ARPA expenditures by County agency in a prescribed format set by the County for internal use, with the first report summarizing ARPA expenditures through July 31, 2021, and subsequent reports following each month thereafter until the U.S. Treasury ARPA funding is fully expended and reported to the U.S. Treasury. Such monthly reports will be approved by the County Controller. • Prepare a complete response to any inquiry or request from the U.S. Treasury for additional information on any reporting filed in accordance with the requirement listed above. • Assist with any investigation or audit authorized by the U.S. Treasury of the reported U.S. Treasury ARPA spending at the County. Annually, advise the County of the proper amount of the U.S. Treasury ARPA spending to list on the annual Single Audit report of federal expenditures through the Single Audit report required for the County’s fiscal year 2025, ending June 30, 2025.
Start and End Date:	2021 - present

The next level
of service

Client Name:	Cass County Commission, MO
Nature of Work:	<p>UHY is currently providing professional services the county to comply with all requirements of the American Rescue Plan Funds Act. The following summarizes our tasks to serve the County:</p> <ul style="list-style-type: none"> • Establish proper accounting and reporting internal control mechanisms to record, track, and disburse funds according to all federal, state, and local laws and regulations • Establish policies and procedures for appropriate document retention and reporting with the Federal Financial Accountability and Transparency Act (FFATA) and/or Treasury Office of Inspector General. • Design and establish application procedures, and confirm verification of eligibility and final disbursement. • Monitor for duplication of benefits and develop processes and documentation requirements around subrecipient risk assessment, monitoring and management. • Coordinate between federal, state, and local agencies as needed. • Provide for fraud, waste, and/or abuse identification, reporting, and remediation. • Provide oversight and guidance to guarantee compliance with OMB Uniform Guidance, 2 CFR, Part 200, and the Single Audit Act, including performing internal control risk assessments as required. • Establish one or more appeals procedures for disputes regarding amounts awarded, including processes for evaluation of final determinations. • Provide regular and frequent status reports, including reporting on financial performance and projection modelling, the form and contents of which shall be dictated by the County. • Establish review processes for any new/future reporting requirements related and/or applicable to the Rescue Plan Funds. • Regulatory compliance expertise including identification of authorized uses of the Rescue Plan Funds. • Interpret Federal Guidance and establish and/or verify eligibility under the Rescue Plan Funds. • Establish procedures for verification of eligibility for award and expenditure of Rescue Plan Funds. • Resolve any requests for information, justification, audit findings, and eligibility appeals. • Review contracts and purchasing documentation to ensure cost recovery and compliance of expenditures using federal funds.
Start and End Date:	2021 - present

REFERENCES

There is perhaps no better way to judge the quality of a professional services firm than to have a discussion with that firm's current clients. We encourage you to reach out to the following UHY clients to discuss with them their service experience.

Reference 1

Client Name:	City of Bristol, CT
Contact Name/Title:	Jeff Caggiano Mayor
Address:	111 N Main St., 3rd floor Bristol, CT 06010
Telephone Number Email	860 584 6250 mayorsoffice@bristolct.gov
Start and End Date:	2021 - present

Reference 2

Client Name:	City of Chelsea, MA
Contact Name/Title:	Ned Keefe, Deputy City Manager
Address:	Office of the City Manager Chelsea City Hall 500 Broadway, Room 302 Chelsea, MA 02150
Telephone Number Email:	617 466 4100 nkeefe@chelseama.gov
Start and End Date:	2021 - present

Reference 3

Client Name:	Anne Arundel County, MD
Contact Name/Title:	M. Michael Beard Financial Reporting Manager, Office of Finance
Address:	44 Calvert Street Annapolis MD, 21401
Telephone Number Email:	410 222 2366 fnbear00@aacounty.org
Start and End Date:	2021 - present

Reference 4

Client Name:	Cass County, MO
Contact Name/Title:	Bob Houston Presiding Commissioner
Address:	102 E. Wall Street Harrisonville, MO 64701
Telephone Number Email	816 380 8160 bhouston@casscounty.com
Start and End Date:	2021 - present

The next level
of service

5. A summary of your firm as outlined in Section II.3 of this document. Please note that joint ventures are acceptable for submission.

5. SUMMARY OF UHY

II. 3. A. FIRM OVERVIEW

A. Vendor Overview

Please provide the following:

- The name and location of your company, including the office location that will be serving the Town.

Contact information

UHY Advisors Mid-Atlantic MD, Inc.
8601 Robert Fulton Drive, Suite 210
Columbia, MD 21046
Phone: 410 423 4832 | Fax: 410 381 5538

Connecticut office address

UHY Advisors NY, Inc.
6 Executive Drive, Suite 111
Farmington, CT 06032
Phone: 860 676 9020

- A brief general description of your business.

- Is your company a subsidiary of another corporation? If so, what is the name of the parent company?

- The number of personnel employed by your company (please include the number of staff dedicated to provide requested services).

- The primary line of business of your firm.

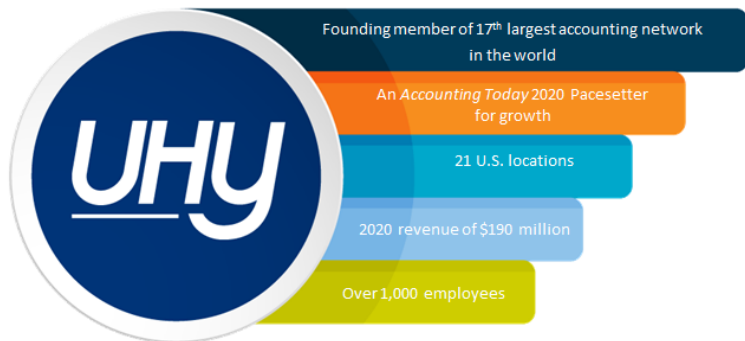
General description

UHY Advisors, Inc. and its subsidiaries provide tax and business consulting services. UHY LLP is a licensed CPA firm that offers audit and other attest services to public and private companies as well as governmental organizations. We are a top 35 U.S. accounting firm with revenues in excess of \$190 million and over 1,000 employees. Internationally, we are a

top 20 accounting firm with revenues in excess of \$500 million and over 5,000 employees. Our Farmington, Connecticut, office is part of UHY's Northeast region, which has served New York and Connecticut businesses and organizations for over 55 years through the efforts of over 250 professionals. This **local office** has a strong public sector practice and will provide ease of communication and ready access for the Town.

Even though our practice is structured differently from some other CPA firms, you will find that we provide all our services seamlessly to our clients. We call our philosophy "The Next Level of Service". Our clients tell us it's what sets us apart. Our commitment to client service is personable, value-added and cost-effective. Our goal is to exceed our clients' expectations on every engagement. We make our national resources available to meet your every need.

UHY's Partners, Principals, Managing Directors and staff members bring with them a wide array of industry experience, including state and local government, real estate, not-for-profit, higher education, employee benefits, government contracting, manufacturing and distribution, construction and



technology. Our client service model is based on a proactive style and passionate spirit that has allowed us to help our clients enhance growth, avoid financial pitfalls and reduce costs amidst ever-changing economic conditions.

We pride ourselves on being a learning organization and strive to keep our clients and staff abreast of the evolving relevant industry topics. We work diligently to produce regular news alerts and newsletters on the latest accounting, legislative, regulatory, tax, valuation and operational issues in the industry. Throughout the year, we host training sessions for staff and technical seminars for clients. These resources are available to clients and their support teams so they are able to run their organizations at peak performance.

- The number of years your company has been in business.

UHY was established in 1968, and have been providing services for over 50 years.

Accessibility regardless of location

We pride ourselves in our agility and our accessibility.

Thanks to today's technology, we have quickly and effectively adapted to the changing environment and the new reality that this pandemic has created: the proximity of a service provider and its client is no longer a critical success factor in the client service delivery process. Our client delivery model continues to provide seamless services virtually, regardless of location, by deploying tools, technologies and personnel as required. Our level of effectiveness in producing results for our clients has never wavered. We have successfully adapted to this new way of working while keeping our client satisfaction ratings at an all-time high.

II. 3. B. CLIENT BASE

B. Client Base

Provide specific reference information for three clients you have served, relevant to the work proposed, to include:

- Client name and location*
- Starting date of service and completion date*
- Contact name, title and telephone number*

Please see the project descriptions and references listed in the prior section.

The successful firm shall comply in all aspects with the Equal Employment Opportunity Act. A firm with 15 or more employees shall be required to have an Affirmative Action Plan which declares that the contractor does not discriminate on the basis of race, color, religion, gender, national origin or age, and which specifies goals and target dates to assure the implementation of equal employment.

We certify that UHY will comply in all aspects with the Equal Employment Opportunity Act. We are committed to compliance with all laws and regulations relating to equal employment opportunity, affirmative action, harassment and diversity. We are an equal opportunity employer and recruiter that seeks high-quality competent and responsible people without regard to race, religion, creed, color,

Distinguishing Characteristics

- More than 50 years of experience providing financial and compliance auditing and consulting services for the municipal industry
- Partners, Managing Directors and senior executives serving you with an average of 20 years of experience
- A commitment to engagement team continuity
- Hands on Partner/Managing Director involvement and more attention from leadership
- In-depth technical and industry-specific expertise
- Economical fee structure

*The next level
of service*

citizenship, national origin, age, gender, gender identity/expression, sexual orientation, marital status, disability, veteran status or any other legally protected basis in accordance with all applicable federal, state and local laws and regulations.

Our firm and the Columbia office is exceptionally diverse.

	COLUMBIA OFFICE	NATIONAL UHY	COLUMBIA LEADERSHIP	NATIONAL LEADERSHIP
Female	69%	51%	37%	18%
Male	31%	49%	63%	82%
Minority Personnel	60%	18%	6%	7%

As a demonstration of our commitment, we propose a diverse professional team for the Town that includes minority and female members.

We are proud of our commitment to diversity programs and supporting our profession’s programs that encourage more minority representation in college and university accounting programs. Along with the profession, we have long seen the scarcity of minorities attracted to academic majors and programs that would prepare them for working at a CPA firm. As a result, we participate as sponsors and speakers at programs that are aimed at attracting minority high school students to consider accounting as a potential career while contemplating subject majors and preparing for college.

Prior to the execution of any contract, the Town of Colchester requires that any awarded contractor providing materials, equipment or services to the Town, must provide to the Town a certificate of insurance (Acord or other approved format) naming the Town of Colchester as additional insured.

UHY can meet your insurance requirements and will provide the Town with a Certificate of Insurance within ten (10) calendar days after the Town issues the notice of award.

C. FEE SCHEDULE

c. A fee schedule for the services and/or method for fee schedule development. Please note that evaluation and subsequent award of a resultant contract is primarily based on qualifications and not based on fee schedule; however, the cost for your firm's services will be one of the criteria relevant to final selection.

We strive to keep our fees at the most reasonable level consistent with the highest professional standards. We look forward to a long-term relationship with the Town, one that is professionally satisfying and makes sound business sense for all parties. We are innovative-minded professionals with great experience but without the premium price.

The fees are based on an hourly rate by labor category. We do not charge for routine discussions related to our ongoing services or out-of-pocket costs. However, if any inquiry leads to work approaching the project level, we will meet with your management to agree on the scope of the services and final deliverables. As we approach the contract ceiling, or should the level of effort for the continuous monitoring phase or the transparency phase be substantially different than what we have proposed, we will provide you with additional information to support our request for a change in scope to the engagement. If our fee estimate is not in line with your expectations, we would be happy to discuss further and assess the balance between scope, cost and value. We have taken measures to be price sensitive on all our engagements and encourage a candid dialogue regarding our proposed fees.

Should our assumptions with respect to these matters be incorrect or should the condition of the records, degree of cooperation, or other matters beyond our reasonable control require additional commitments by us beyond those upon which our estimated fees are based, we may need to adjust our fees and planned completion dates accordingly. If we anticipate additional professional fees for reasons beyond our control, we will discuss the matter with you before we proceed.

Our **annual fee** is outlined in the table below. We anticipate that funds will be expended by 12/31/2024. If the Town extends its use of its ARPA funding past that date, we will not increase our hourly rates by greater than 3% per year.

Labor Category	Hours	Bill Rate	Extended Rate
Partner/Managing Director	16	\$275	\$4,400
Manager	32	\$200	\$6,400
Senior	68	\$150	\$10,200
Staff	90	\$100	\$9,000
Total	206		\$30,000

The next level
of service

APPENDIX

FORMS & ADDENDA ACKNOWLEDGEMENT

**TOWN OF COLCHESTER, CONNECTICUT
NON-COLLUSION CERTIFICATION**

The undersigned certifies under penalty of false statement that this proposal or contract has been made, submitted and executed in good faith and without collusion or fraud with any other person, and without any agreement designed to limit independent bidding or competition. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

I further certify that I have not provided or directed to be provided gifts, meals, or gratuities, as defined in the Town of Colchester Code of Ethics to any official or employee of the Town of Colchester responsible for awarding or administering this bid or contract.


Please complete and sign

Legal Name of Bidder: UHY Advisors Mid-Atlantic MD, Inc.

Business Address: 8601 Robert Fulton Drive, Suite 210
Columbia, MD 21046

Name of Authorized Agent Jack Reagan Title: Managing Director

Phone: 410 423 4832 Fax: 410 381 5538

Signature:  Date: January 18, 2022

*The next level
of service*

**REQUEST FOR PROPOSALS
TOWN OF COLCHESTER, CONNECTICUT**



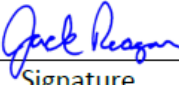
**Project Consultant
for Use of ARPA
Funding
2022-001**

Due Date: 11:00 am, Wednesday, January 26, 2022

Town of Colchester
First Selectman's Office
127 Norwich Avenue, Suite 201
Colchester, Connecticut 06415

In accordance with the Town's requirements, the undersigned agrees to provide services as defined herein.

The undersigned is familiar with the conditions surrounding this Request for Proposals, is aware that the Town reserves the right to reject any and/or all submissions, and is making submission without collusion with any other person, individual or corporate.

Jack Reagan	
_____ Name	_____ Signature
UHY Advisors Mid-Atlantic MD, Inc.	Jack Reagan
_____ Company Name	_____ Printed Name
8601 Robert Fulton Drive, Suite 210	Managing Director
_____ Address	_____ Title
Columbia MD 21046	January 18, 2022
_____ Town State Zip	_____ Date
20-2072957	410 423 4832
_____ Federal ID #	_____ Telephone Number
jreagan@uhy-us.com	410 381 5538
_____ Email address	_____ Fax Number

RETURN THIS FORM IMMEDIATELY!

**Town of Colchester, Connecticut
Acknowledgment: Receipt of RFP Documents**

**Request for Proposals
2022-001
Project Consultant for
Use of ARPA Funding**

Please take a moment to acknowledge receipt of the attached documents. Your compliance with this request will help us to maintain proper follow-up procedures while ensuring that all recipients have the opportunity to submit responses.

Date issued: January 4, 2022

Date documents received 01 / 05 / 2022

Do you plan to submit a response? Yes No

Print or type the following information:

Company name: UHY Advisors Mid-Atlantic MD, Inc.

Address: 8601 Robert Fulton Drive, Suite 210

City or Town: Columbia, MD 21046

Phone: 410 423 4832

Fax: 410 381 5538

Email: jreagan@uhy-us.com

Received by: Jack Reagan 

**Note: Faxed acknowledgments are requested!
FAX (860) 537-0547
A cover sheet is NOT necessary.**

**Town of Colchester, Connecticut
Request for Proposals 2022-001
Project Consultant for Use of ARPA Funding
Addendum #1**

Please note the following change to Section I.4 Project Schedule:

There will be an opportunity to further discuss the RFP with Town staff on **Tuesday, January 18, 2022 at 10:00am.**

The meeting noted above will be conducted as a virtual Zoom meeting, NOT in person. Interested firms should contact the First Selectman's office at rfuller@colchesterct.gov if you wish to receive the zoom link for the meeting on Tuesday morning.



Colchester Long-Term Recovery Committee Resident Survey Results

Reported October 2020

COVID-19 needs no introduction. In fact, it is a name we would all like to forget. The pandemic will result in impacts anticipated to be felt for many years. Many aspects of our everyday lives have indeed been changed forever, and many ramifications are yet unrealized. Lives have been lost, families have struggled, school-aged children have suffered setbacks and our economy, particularly small businesses, have been forced to make sacrifices that may, or already have, resulted in substantial losses, many permanent.

What makes this disaster particularly impactful is that existing emergency or incident response protocols designed to respond to natural disasters are substantially inapplicable. For the most part, we were caught off guard. Short-term response came in the form of an effort to reduce the spread, educate the populous, and scramble to acquire personal protective equipment (PPE). Good, useful information was countered with bad, harmful information, conspiracy theories abound and many worried, and still do, that their freedom was being tampered with.

In response to a directive from State of Connecticut Governor Lamont, municipalities were asked to create a committee to evaluate and respond to the long-term impacts of the pandemic, albeit remotely. In Colchester, the Planning Director was tasked with assembling a group of individuals representing a range of interests, and thus, a 10-member Long-Term Recovery Committee convened, meeting regularly via ZOOM.

Unfortunately, direction from State or regional emergency response teams was, and has been, limited as the more immediate, short-term response remains the priority. The Committee decided to move forward with the understanding that the goals and objectives of this group were likely to evolve as more information about the pandemic and its impacts is gathered. In order to accommodate this uncertainty, the Committee recommended the following statement as the charge as they understood it:

The Colchester Long-Term Recovery Committee was established to identify the short and long-term needs of the Colchester community as residents and businesses recover from the COVID-19 pandemic. The Committee's findings and recommendations, based on feedback from community members, will be presented to the Board of Selectmen and communicated with local groups and organizations.

The following is a report on the results of a survey drafted by the Committee to gather input from Colchester residents on the varying impacts of COVID-19 on their lives. The Committee emphasized the use of a digital survey by sharing a brief introduction and link to the survey with as many public interest groups as possible. A QR-Code was produced, and flyers were distributed by Committee members to residents who may not have received the link to the survey.

This report includes several recommendations that should be considered examples of the many ways the municipality and residents of Colchester might respond to the needs of the public. These recommendations are intended to help the Board of Selectmen, appropriate town departments, and key local community service organizations, prioritize and organize action. The Long-Term Recovery Committee intends to contribute however appropriate.

Long-Term Recovery Committee Members

Matthew Bordeaux, Town of Colchester Planning Director, Chair

Greg Barden

Charlie Brown

Dave Koji

Jack Faski

Alex Levere

Chuck Maynard

Marge Mlodzinski

Michelle Noehren

Rosemary Coyle, Board of Selectmen Liaison

A special thanks is required for Michelle Noehren, a Colchester resident and founder of 'Colchester is Kind', for the work she put into the generation of the survey and preparation of this report.

Additionally, the Committee extends its appreciation to the CT Data Collaborative for its helpful review of the survey data and assistance in report preparation.



Survey Respondents

There were 1,009 responses to the COVID-19 survey. Of those 1,009 responses, 99% are from Colchester residents. 79.8% of respondents identify as female, 20% as male, and .2% selected the “other” category.

From youngest to oldest, .2% of respondents are under the age of 18, .8% are between ages 18-24, 30.8% between the ages of 25 and 44, 42.2% between the ages of 45 and 64, and 26% are over the age of 65. The majority of respondents (73.8%) are of working age (18-65).

Consistent with Town of Colchester demographics overall, the majority of survey respondents identified as White (91.1%), followed by Asian (1.1%), Black or African American (0.9%), American Indian or Alaska Native (0.2%), and Native Hawaiian and Pacific Islander (0.2%). Approximately 4.7% chose not to disclose their race.

The majority of respondents (8 out of 14) who selected “Other” for race wrote in an identity that is consistent with Hispanic/Latino ethnicity. The committee did not ask respondents about their ethnicity, which likely would have provided additional helpful information. See Appendix A for a copy of the survey.

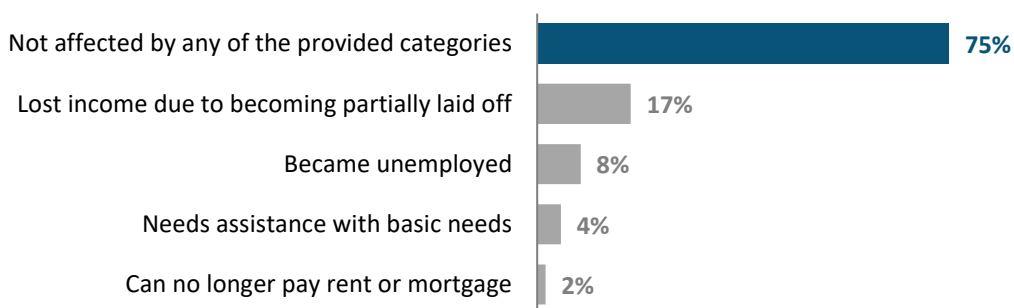
Effects of COVID-19

This survey asked Colchester residents to share how COVID-19 has impacted their lives across a variety of factors, including income and financial stability, child care and education, and mental health and relationships. The survey also asked about any positive effects of COVID-19 on Colchester residents. See Appendix B for a summary of the themes from open-ended responses for additional impacts of COVID-19.

Income & Financial Stability

When asked how the pandemic has challenged respondents economically, 17% said they lost income due to becoming partially laid off, 8% said they became unemployed, 4% said they need assistance with basic needs, and 2% said they can no longer pay their rent or mortgage. 75% of respondents said they were not affected by any of the provided categories.

The majority of respondents shared that they have not been affected economically by Covid-19.



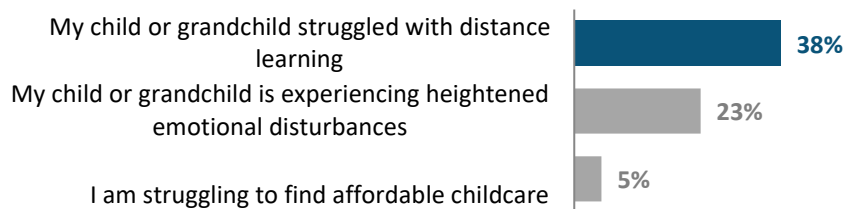
Approximately 15% of open-ended responses were about changes in employment, while another 4% were about the economy, and 3% about financial struggles.

Recommendation: Develop separate communications for each social program offered through Colchester Social Services including energy/heating assistance, school lunches, and the Food Bank. Communications should educate residents about the purpose of each program and how to access it. The committee will utilize email, social media, and shareable graphics to reach the populations most economically effected by COVID-19.

Child Care & Education

For respondents with children or grandchildren, 38% said they have at least one child in the Colchester school system and struggled with distance learning, 23% said their child is experiencing heightened emotional disturbances, and 5% said they are struggling to find affordable childcare.

More than 1 in 3 (38%) respondents said that their child or grandchild struggled with distance learning.



Of the open-ended responses, 12% were about child care and education with approximately two-thirds focused on shifting to distance learning and another third about struggling with the loss of child care.



I am an elementary school teacher so I was very stressed trying to implement distance learning with 5-10 year olds and I have lots of anxiety about the safety of myself and students going back to school.”

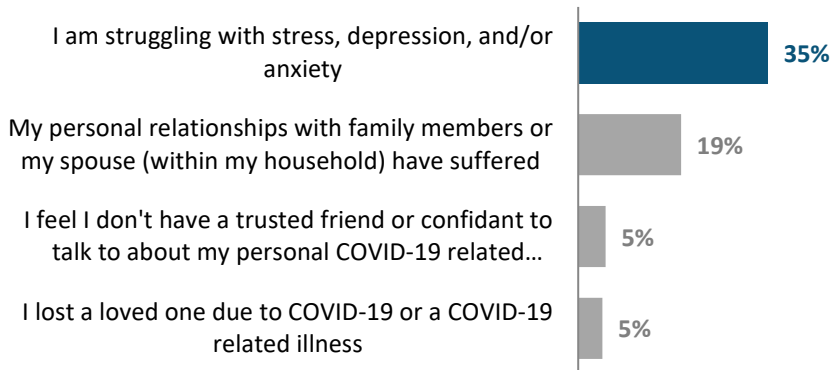
Recommendation: Work with the school district to identify strategies to help students maintain focus during distance learning such as setting up a classroom environment at home and sticking to a schedule. Additionally, identify experts in child psychology to develop a communication for parents about how they can best support their child’s mental health. Work with the school district and PTO’s to determine the best way to distribute this information for parents and caregivers.

Mental Health & Relationships

When asked how their mental health and/or personal relationships have been impacted by COVID-19, over one-third of respondents (35%, 357) said they are struggling with stress, depression, and/or anxiety. One in five respondents (19%) said their personal relationships with family members or their

spouse have suffered, 5% said they don't have a trusted friend to talk to about their personal COVID-19 related feelings, and 5% said they lost a loved one to COVID-19.

More than 1 in 3 (35%) respondents said that they are struggling with stress, depression, and/or anxiety.



Over half (55%) of the open-ended responses about the impacts of COVID-19 were about people struggling with mental health, isolation, and relationships.



I have not been able to visit my adult children and grandchildren who live in New York and Virginia since the beginning of the pandemic. I really miss my visits with them.



I work from home and love my solitude. The isolation is a whole other animal that I struggle to keep from consuming me.

Recommendation: The Committee should develop a communication that would go out either as a town-wide mailing or an insert in the Rivereast News Bulletin that would provide a link to a database of therapists, as well as a link to information about programs like Alcoholics Anonymous (AA), support groups, and local places of worship. Due to the high number of respondents struggling with anxiety and depression, this initiative is extremely pertinent and warrants the allocation of resources (funding, etc) to support an action of this kind.

Older Adults

For those age 60 and over, 24% said they have experienced social isolation, 5% said they have had trouble getting groceries, 7% have struggled with technology, 1% had trouble getting their medications, 0.8% were not able to find a mask, and 0.5% had difficulty getting transportation.



1 in 4 older adults experienced social isolation



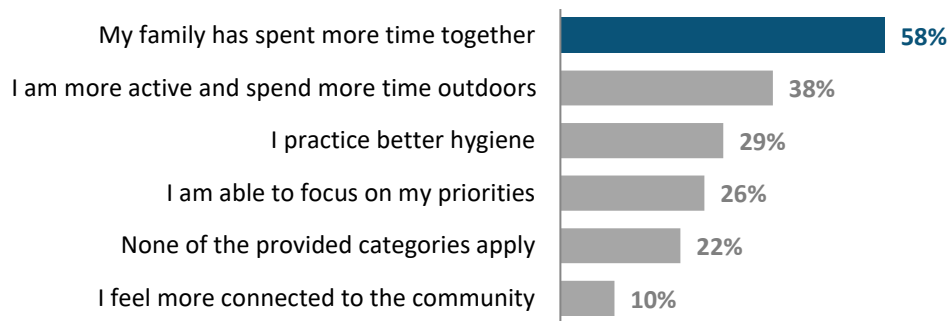
I'm isolated. I've gained weight because I can only exercise in a therapy pool. I miss being able to hug my grandkids. I worry constantly about our country, the world and the way people are suffering. At times, I can't get supplies or food I need.

Recommendation: The Town should identify who is most affected and where they are located and develop a plan to address the issues. Suggestions of outreach include local churches and synagogue, Senior Center, community and housing groups, social service agencies, youth groups, etc. In addition, we need to identify opportunities for education and outreach with regards to technology, e.g., identifying available hardware/software options, on-line instruction, programs at the Senior Center, the Connecticut Tech Act Project through the Connecticut Department of Aging and Disability, partnering with students at Bacon Academy and one-on-one instruction with residents.

Positive Changes

When asked if respondents experienced any positive outcomes as a result of the pandemic, 58% said their family has spent more time together, 38% said they are more active and spend more time outdoors, 26% said they are able to focus on their priorities, 10% said they feel more connected to the community, 29% said they practice better hygiene, and 22% said none of the provided categories applied to their situation.

Over half (58%) of respondents said that their family has spent more time together as a result of the COVID-19 pandemic.



Opened-ended responses about the positive impacts included improved relationships, time to try new activities, time for home projects, slower pace, learning new information about where they live, less traffic, saving money, improved spiritual practice, distance learning, cleaner oceans, and getting a pet.



Became more knowledgeable about community by listening to Mary on facebook live videos daily.



Gained greater appreciation for the rural character of the town and all its open space.

Community Resources

Respondents were asked what community resources they have found most helpful. The most popular responses were:

Communications

- First Selectman’s Facebook updates
- Governor Lamont’s updates
- Emails from the school district

Programs/Organizations

- Curb-side library pick up
- Kids crafts provided by the library
- Colchester Senior Center
- Colchester is Kind
- Colchester Food Bank
- Free school lunches
- Colchester Land Trust

Businesses

- Businesses who offered curbside pick up (including grocery stores)
- FUD delivery

Other

- Local hiking trails
- Individuals who made and donated masks

The vast majority of respondents (81.2%) indicated they have enough information about COVID-19 to keep them and their families safe. 4.8% said they do not have enough information and 14% were unsure.

Consumer Behavior

The Committee was interested in learning how the pandemic has affected consumer behavior. Despite public health concerns related to the pandemic, the majority of respondents continue to shop in store: 88% of respondents said in-store, 25% said pick-up, and 32% said delivery.



88%

shopped in store



25%

picked up shopping



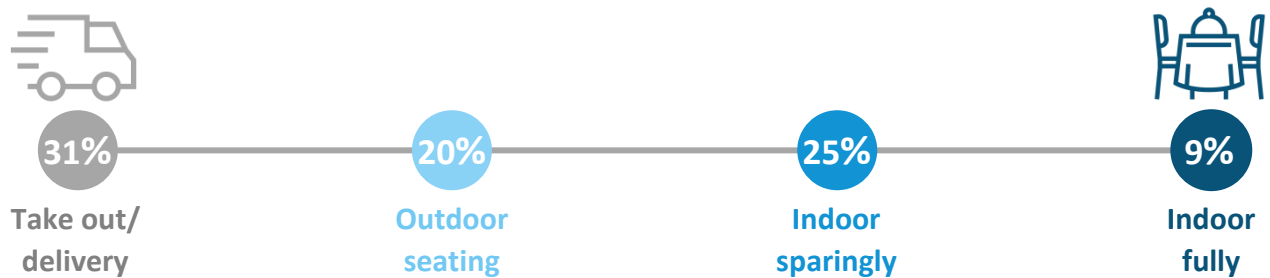
32%

used delivery services

Recommendation: Build a stronger relationship with organizations like the Colchester Business Association (CBA) to improve the marketing of and support services for local businesses. In the absence of a chamber of commerce, the CBA, perhaps in partnership with the Town of Colchester Economic

Development Commission, should also grow its presence as a source of information and opportunity. The Town and the CBA should monitor trends in the various industries affecting Colchester businesses and work to respond to the needs identified.

When asked what they are most likely to do when the State removes all restrictions to dine-in at restaurants, 31% said they will continue ordering take-out/delivery, 25% said they will start dining-in at restaurants, but sparingly, 20% said they will only dine-in at a restaurant with outdoor seating, 16% said they don't frequent restaurants often enough to make a decision, and 8.6% said they will start dining-in at restaurants, as they would normally have done prior to COVID-19.



Recommendation: Hold a local forum to discuss ideas for restaurant owners and operators to consider as the cold-weather approaches and with it the limitations of the outdoor-dining option. Invite local code officials, as well as marketing and internet commerce specialists, to share information and encourage innovation.

Lastly, when asked if they are shopping more locally than before the pandemic, 43% said no, 14% said maybe, and 42% said yes.



Recommendation: Again, improving the marketing of local businesses is a role for many community stakeholders. The pandemic unquestionably impacted the way consumers acquire goods and services. Looking at these figures with a glass half-full, a 42% increase in local shopping is something to celebrate. Building off that response is critical. This Committee should continue to explore ways to spread the message and educate the public about the role of the local economy in the quality of life for residents.

Community Needs

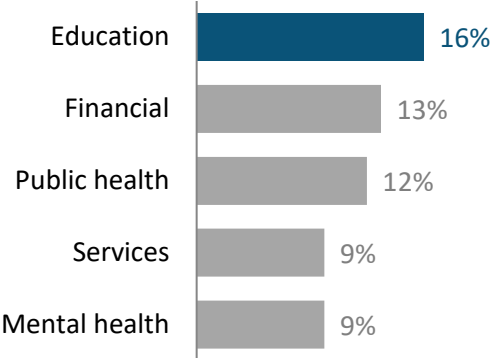
The survey asked the Colchester community what help they need right now and what help they will need in the future. A full list of themes with counts can be found in Appendix C for help needed now and Appendix D for help needed later.

The top three themes for **help needed now** were help with education (plan for reopening schools, actually reopening schools, childcare, and assistance with distance learning), financial assistance, and public health (increased awareness, clear guidelines, adherence to guidelines, information dissemination, and access to supplies, testing, and a vaccine). Respondents also expressed a need for expanded services, which included help with errands, internet, expanded hours for the food bank, transportation to appointments, more delivery options, and close-captioned videos. Nine percent of respondents reported needing help with mental health to manage their stress and other social-emotional challenges due to COVID-19. Note that some responses had more than one theme (119 responses with 129 themes coded).

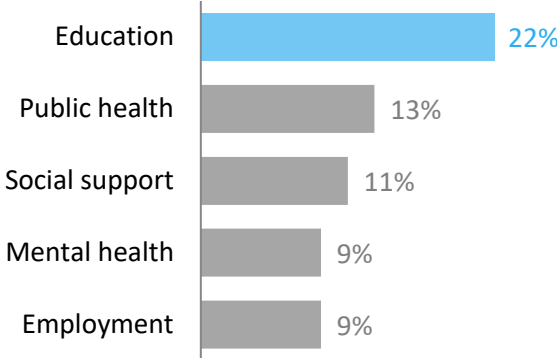
The top three themes for **help needed long-term**, excluding those who responded none or not sure, were help with education (plan for reopening schools, actually reopening schools, child care, options for school format, and receiving a quality education), public health (adherence to guidelines, information dissemination, access to a vaccine and supplies), and social support. Respondents also expressed a need for mental health services (9%), employment (9%), other services such as help with errands and transportation (6%), and food assistance (6%). Note again that some responses had more than one theme (112 responses with 128 themes coded).

Three themes emerged as cross-cutting between help needed now and help needed long-term. Those were: education, public health, and mental health.

Top 5 themes for help needed now



Top 5 themes for help needed long-term



Appendix A: Colchester COVID-19 Survey

Measuring the Impact of COVID-19 on Colchester Residents

The newly established COVID-19 Long-Term Recovery Committee is conducting a survey of Colchester residents to gather information about how individuals and families have been affected by the current pandemic.

Your response to this survey is completely anonymous.

The information received will be used to help the committee develop suggestions for the Town moving forward.

This survey will close at 5 PM on July 20, 2020. Completed surveys will be accepted by mail or drop off. You can mail this survey to: Town of Colchester, ATTN: Matthew Bordeaux, 127 Norwich Ave, Colchester, CT 06415 or you can drop it off through the drop box at Town Hall.

Demographics

First, tell us about yourself. Your information is anonymous.

1. Are you a resident of Colchester?

- Yes
- No

2. What is your age?

- Under 18
- 18-24
- 25-44
- 45-64
- 65 and over

3. What is your gender?

- Female
- Male
- Other: _____

4. What is your race?
- White
 - Black or African American
 - American Indian or Alaska Native
 - Asian
 - Native Hawaiian and Pacific Islander
 - I do not want to disclose this information
 - Other: _____

5. How many people live in your home?

6. How many people under the age of 18 live in your home?

Effects of COVID-19 on the Community

Please note that this information is being collected for informational purposes only.

1. We care about how the pandemic has affected our community. Please select the ways you have been challenged economically due to COVID-19.
- I became unemployed due to COVID-19.
 - I lost income due to being partially laid off/reduction in hours.
 - I can no longer pay my rent or mortgage.
 - I need assistance with basic needs such as food.
 - None of the above.
2. If you have children or grandchildren, please let us know if you have been affected in any of the following ways:
- I am struggling to find affordable childcare options.
 - My child is experiencing heightened emotional distress.
 - I have at least one child in the Colchester school system and found digital learning difficult.
 - I do not have children or grandchildren in Colchester.

3. How has your mental health and/or personal relationships been impacted by COVID-19?
- I am struggling with stress, depression, and/or anxiety due to COVID-19.
 - My personal relationships with family members or my spouse (within my household) have suffered.
 - I feel I don't have a trusted friend or confidant to talk to about my personal COVID-19 related feelings.
 - I lost a loved one due to COVID-19 or a COVID-19 related illness.
 - None of the above.
4. Do you feel that you have adequate information about COVID-19 to keep you and your family safe?
- Yes
 - No
5. We are interested in knowing if you have experienced any positive outcomes related to the pandemic. Please select all that apply.
- My family has spent more time together.
 - I am more active and spend more time outside.
 - I have been able to focus on my priorities.
 - I feel more connected to my community.
 - I practice better hygiene.
 - None of the above.
 - Other: _____
6. If there are other ways that COVID-19 has impacted your life that were not described above, please use this space to tell us about your experience.
7. If you are age 60 and over, please select all that apply to your COVID-19 experience.
- I am not over the age of 60.
 - I have experienced social isolation.
 - I have had a hard time getting my medications.
 - I have had trouble getting groceries.
 - I have not been able to find a mask.
 - I have struggled with technology.
 - I have had difficulty getting transportation to medical and other appointments.

Colchester Senior Center

If you are age 55 or over and need immediate help, please contact the Colchester Senior Center at (860) 537-3911.

8. What community resources, if any, have you found most helpful during this time?

9. What help, if any, do you need right now?

10. What help, if any, do you need long-term?

Immediate Assistance

If you need immediate assistance, please contact Colchester Youth & Social Services by calling (860) 537-7255.

Consumer Behavior

Lastly, please let us know how your behavior as a consumer has changed due to COVID-19.

1. How are you doing your shopping?
 - In store
 - Pick up
 - Delivery

2. When the State removes all restrictions to dine-in at restaurants, what are you most likely to do?
 - Continue to order take-out/delivery.
 - Start dining-in at restaurants, but sparingly.
 - Start dining-in at restaurants, as I normally would have prior to COVID-19.
 - I will only dine-in at a restaurant with outdoor seating.
 - I don't frequent restaurants often enough to make a decision.

3. Have you found that you are shopping more locally than you were before the pandemic began?
 - Yes
 - No
 - Maybe

Thank you for taking the time to complete this survey. Your feedback will be used to provide recommendations to the Town about how to best help Colchester residents and the community-at-large.

Appendix B: Additional Effects of COVID-19

Summary of themes from respondent comments about additional effects of COVID-19.

Theme	Count
Cancelled - activities	28
Cancelled - services	7
Cancelled - travel	6
Economy – cost of living	6
Economy – small business	6
Education - general	1
Education - childcare	10
Education – distance learning	21
Education – schools reopen	2
Employment - general	3
Employment - changed	2
Employment – hours cut	2
Employment – job loss	10
Employment – pay cut	2
Employment – work from home	14
Employment - work more	9
Financial - challenges	6
Financial - investments	2
Isolation	75
Mental health	67
None or not sure	2
Other	1
Other - access to care	1
Other - change in charitable giving	1
Other - lack of food options	1
Other – weight gain	3
Other - wedding change	1
Other - changed behavior	1
Positive - activities	7
Positive - distance learning	1
Positive - environment	1
Positive - got a pet	1
Positive - home	7
Positive - information	4
Positive - less traffic	3
Positive - nature	1
Positive - new activities	1

Theme	Count
Positive - other	1
Positive - relationships	14
Positive - saving money	3
Positive - services	1
Positive - slower pace	7
Positive - spirituality	2
Public health - adherence	10
Public health - distrust	12
Public health - got COVID	1
Public health - information	1
Public policy - change	1
Relationships - family moved in	6
Relationships - family moved out	2
Relationships - became caregiver	2
Relationships – depend on others	1
Relationships – safety concerns	1
Relationships - loss of a loved one	4

Appendix C: Help Needed Right Now

Summary of themes from respondent comments about help needed right now.

Theme	Count
Assistance – financial	15
Assistance – food	3
Assistance - housing	2
Economy – financial (support for local arts)	1
Economy - information	2
Economy - reopen	3
Education - childcare	2
Education – distance learning	3
Education – reopen plan	9
Education – reopen plan	1
Education - school	1
Education – schools reopen	3
Employment - essential	1
Employment – flexible work	1
Employment - job	5
Mental health	11
None or not sure	5
Other	5
Policy change - general	5
Policy change - taxes	4
Public health - adherence	3
Public health - awareness	1
Public health - guidelines	5
Public health - information	1
Public health - supplies	2
Public health - vaccine	1
Public health - testing	1
Services - accessibility (closed-captions)	1
Services - accommodations (more delivery options)	1
Services - errands	5
Services - expand hours	1
Services - internet	2
Services - transportation	1
Social support	9
Volunteer opportunities	4
Youth activities	9

Appendix D: Help Needed Long Term

Summary of themes from respondent comments about help needed right now.

Theme	Count
Assistance - financial	5
Assistance - food	7
Assistance - housing	2
Economy - reopen	3
Economy - small business	1
Education	2
Education - childcare	5
Education - options	4
Education - quality	1
Education - reopen plan	7
Education - schools reopen	6
Employment	1
Employment - increase hours	2
Employment - job	7
Mental health	10
None or not sure	17
Other	6
Policy change	5
Policy change - taxes	1
Public health - adherence	4
Public health - information	4
Public health - supplies	2
Public health - vaccine	4
Services	4
Services - errands	1
Services - internet	1
Services - transportation	1
Social support	12
Youth activities	3

RESUMES

JACK REAGAN



**PARTNER, UHY LLP
MANAGING DIRECTOR, UHY ADVISORS,
INC.**

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Direct: (410) 423-4832

INDUSTRY EXPERTISE:

- State and Local Government
- Federal Government
- Not-for Profit

**ACTIVE & PRIOR PROFESSIONAL
MEMBERSHIPS:**

- American Institute of Certified Public Accountants (AICPA)
- Association of Government Accountants (AGA)
- Association of School Business Officials (ASBO)
- Government Finance Officers Association (GFOA)

ACTIVE & PRIOR CIVIC MEMBERSHIPS:

- University of Richmond Accounting Department Advisory Board
- University of Richmond Robins School of Business Dean's Advisory Board
- DC Scores

Jack is a member of UHY's audit practice out of Columbia, MD and has recently been appointed to UHY LLP's Management Committee. Jack has over 30 years of experience serving state and local governments, local school districts, federal government entities, and not for profit organizations as both an auditor and consultant. He has served many of the largest state and local government entities throughout the country including: New York City, Boston, San Jose, Nashville and Washington, D.C., as well as the states of New York, Texas, New Jersey, Delaware and California and Fairfax County (Va.), Loudoun County (Va.) and Montgomery County (Md.). Jack currently leads many ARPA consulting engagements for cities and counties across the nation. He also serves as an ARPA subject matter expert for the City of Detroit, MI.

Jack has successfully assisted numerous localities obtain and maintain their GFOA and ASB Certificates of Excellence in Financial Reporting. He is a widely sought after speaker on emerging issues facing these entities, from technical accounting matters to grants management to other financial management issues. Jack recently was the first recipient of the University of Richmond Accounting Department Alumni of the Year for his contributions to students at his alma mater.

PROFESSIONAL EXPERIENCE:

- Deep experience assisting state and local governments improve their internal control over financial reporting
- Extensive knowledge of budget development process and assisting clients in maximizing revenues and minimizing expenditures
- Strong experience working with investment bankers and other professionals in developing offering documents for bond offerings
- Assisted several federal government entities to obtain their first "clean" audit opinion

BACKGROUND:

- Licensed CPA in the states of Maryland and Virginia
- Certified Internal Controls Auditor
- BSBA in Accounting, University of Richmond, May 1989

THOUGHT LEADERSHIP:

- Association of Government Accountants National Professional Development Training Conference Co-Chair – February 2017
- Michigan Society of Certified Public Accountants Government Day Speaker
- Maryland Society of Certified Public Accountants Government Day Speaker
- New York State Association of Government Accountants Government Day Speaker
- National Association of Counties Annual Legislative Update Speaker on Emerging Governmental Accounting Issues
- Virginia Municipal League Annual Conference Speaker on Emerging Governmental Accounting Issues
- Columbia Webinar Speaker on governmental accounting and grants management issues
- Government Finance Officers Association Special Review Committee Member
- Association of School Business Officials Special Review Committee Member

STACY FARBER



Stacy brings over 23 years of experience in financial leadership to her engagements. She specializes in financial decision making and company-wide policy development to overcome operational issues and drive proactive improvements.

PROFESSIONAL EXPERIENCE:

- Provides advisory consulting services to closely-held businesses, performing compilations, reviews and audits for clients in the various industries.
- Head of the UHY Employee Benefit Plan Center of Excellence for the Northeast Region
- Consolidate and analyze financial statements and results.
- Analyze finances to determine risks and create cash forecasts.
- Advise management on how to craft effective business plans and resolve cost-related issues.
- As a CFO for over 5 years, she lead and managed all areas of accounting operations, including monthly, quarterly and annual close processes, AP/AR/GL, fixed assets, payroll, revenue recognition treatment, collections, financial planning and analysis.
- Assisted small businesses with year-end reconciliations and record clean up.
- Managed company-wide budget, payroll, accounting, IT, purchasing and all other financial operations.
- Cash management, including negotiating and securing financing for capital expenditures.

BACKGROUND:

- Licensed CPA in the state of Connecticut
- B.S. Financial Accounting, Bryant University

THOUGHT LEADERSHIP:

- Quoted in "Upgrading Benefits Administration with Robotic Process Automation", SHRM, June 2021
- Presenter for the CTCPA Employee Benefit Plan Conference, May 2021
- Interviewed in "Small employers have new federal incentives to offer worker retirement benefits", Hartford Business Journal, March 2021
- Panelist in "The CARES Act and Its Impact on Your Business and Benefit Plans", UHY Webinar, February 2021

PRINCIPAL, UHY ADVISORS N.E., LLC

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Direct: (860) 221-7609

INDUSTRY EXPERTISE:

- Manufacturing and Distribution
- Employee Benefit Plans
- Construction
- Retail
- Grocery Store
- Not-For-Profits

ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- Connecticut Society of Certified Public Accountants (CTCPA)
- Chairperson of the CTCPA Employee Benefit Plan Committee
- Member of the CTCPA Advisory Council
- Middlesex Chamber of Commerce
- Glastonbury Chamber of Commerce
- West Hartford Chamber of Commerce

PRIOR CIVIC MEMBERSHIPS:

- Gifts of Love – Treasurer, Board Member

An independent member of UHY International

The next level
of service

JOSE ROMAN



**CONSULTING MANAGER, UHY ADVISORS
MID-ATLANTIC MARYLAND, INC.**

Email: jroman@uhy-us.com
Direct: 520 440 1029

INDUSTRY EXPERTISE:

- State and Local Government
- Manufacturing
- Consumer household products

**ACTIVE & PRIOR PROFESSIONAL
MEMBERSHIPS:**

- Puerto Rico's State Society of CPA's

Jose has over 20 years of experience working in manufacturing with companies like Coca Cola, Texaco, Clorox and United Technologies (now Raytheon Technologies), also working with Defense contractors. He has extensive working experience in Latin America and Canada as an Internal auditor, compliance, risk and SOX manager. He is currently working on several ARPA fund management engagements for Anne Arundel County, MD and City of Bristol, CT, assisting in executing the client's ARPA strategy, continuously monitoring ARPA funded project expenditures, and transparently reporting the results of the ARPA spending to all relevant constituents, including the federal government.

PROFESSIONAL EXPERIENCE:

- Deliver management of financial, operational, and compliance audits with extensive knowledge of global markets, including Mexico, Chile, Honduras, Guatemala, Panama, Argentina, and Canada.
- Analyze risk, evaluate findings, and document key processes using narratives and flowcharts.
- Oversee adherence with policies and procedures and assist leadership in achievement of compliance with Sarbanes Sections 302 and 404 requirements.

BACKGROUND:

- Certified Public Accountant
- B.S. in Accounting, InterAmerican University of Puerto Rico, San Juan Campus

BACARY BADIAGA



MANAGER, UHY LLP

Email: bbadiaga@uhy-us.com
Direct: 410 423 3443

INDUSTRY EXPERTISE:

- State and Local Government
- Not-for-profit
- Single Audits

ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- American Institute of Certified Public Accountants
- Maryland Association of Certified Public Accountants

Bacary is a manager and a member of the Audit and Assurance Department, and has over five years of experience in the audit of state and local governments and not-for-profits. He supervised several large state and local government audits, including the District of Columbia and the Maryland Department of Transportation. He also brings ARPA fund management experience assisting Anne Arundel County, MD with ARPA strategy, monitoring and reporting activities. He has helped several government clients improve their financial reporting and internal controls.

PROFESSIONAL EXPERIENCE:

- Planning and performing audit and attest services for state and local governments and government pension plans
- Performing financial and compliance audits
- Providing government financial reporting
- Conducting compliance testing for Single Audits under OMB Uniform Grant Guidance
- Performing internal controls evaluation
- Assisting with drafting Comprehensive Annual Financial Report (CAFR)
- Served as the engagement manager for several government audits:
 - District of Columbia
 - Maryland Department of Transportation
 - Maryland Food Center Authority
 - Calvert County
 - Charles County
 - Lancaster County
 - Washington County
 - Frederick County
 - City of Hagerstown
 - Saint Mary’s County Public Schools

BACKGROUND:

- Licensed CPA in the state of Maryland
- Bachelor of Science in Accounting, University of Baltimore

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LILY WANG



Lily Wang is a manager in our Audit and Assurance Department. With more than five years of accounting and auditing experience, she has assisted clients in the government and non-profit industries. Her work has included some large local governments and SEC-11K clients. Additionally, she brings experience with employee benefit plan audits. Lily is currently assisting Cass County, MO in providing oversight and ensuring they meet compliance with their ARPA funds. She is fluent in Mandarin.

PROFESSIONAL EXPERIENCE:

- Identify potential risks to design audit plans and improve plans as new potential risks arise
- Execute audit plans by leading teams with multiple staff, managing performance and keeping engagement leaders informed on audit status, resulting in timely deliverables
- Engage clients and provide authoritative advice throughout audits, resulting in successful implementation of new accounting pronouncements
- Train and develop staff, facilitating them to develop the skills and opportunities they need to grow

BACKGROUND:

- Licensed CPA in the state of Maryland
- Master of Science, Accounting and Business Advisory Services, Towson University
- Bachelor of Science, Accounting and Finance, University of Maryland, College Park

MANAGER, UHY LLP

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INDUSTRY EXPERTISE:

- Not-for-Profit
- State and Local Government
- Employee Benefit Plans

ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- American Institute of Certified Public Accountants

OMAR BAHAMMOU



Omar is a senior accountant and a member of the Audit and Assurance Department. He provides attestation and assurance services to companies in a variety of industries, specializing in not-for-profits. His previous experience includes working in the audit department of International Relief and Development Headquarter in Arlington, Va.

PROFESSIONAL EXPERIENCE:

- Provides audit and attest services under generally accepted auditing standards with a focus in efficiency and precision.
- Performs analytical procedures during audit and review engagements
- Ensures compliance with established internal control procedures by examining records, reports, operating practices, and documentation.
- Served as an auditor at the International Relief and Development HQ, conducting evaluations of the organization to assess risk and compliance with regulations, completing audit workpapers by documenting audit test and findings, and preparing audit and control reports after analyzing and summarizing operation information and trends from HQ and field offices.

BACKGROUND:

- Master of Science in Accounting, Stratford University
- Master of Accounting, Auditing and Management Control, University of South Brittany, France

SENIOR ACCOUNTANT, UHY LLP

Email: obahammou@uhy-us.com
Direct: 410 423 3447

INDUSTRY EXPERTISE:

- Not-For-Profit
- For-Profit
- Membership Associations
- Government Contractors
- Distribution

ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- American Institute of Certified Public Accountants (AICPA)

ACTIVE & PRIOR CIVIC MEMBERSHIPS:

- Reston Association

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of service*

MATTHEW DEL PILAR



SENIOR STAFF ACCOUNTANT, UHY LLP

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Direct: 410 423 4822

INDUSTRY EXPERTISE:

- Not For Profit
- Employee Benefit Plans
- Single Audits
- State and Local Government

Matthew Del Pilar is senior staff accountant with two-years of auditing experience in Single Audit, employee benefit plans and agreed-upon procedures. He conducts financial audits and Single Audits as defined by Compliance Supplement, audit client's engagement history, and planned audit approach.

PROFESSIONAL EXPERIENCE:

- Successfully completed an agreed-upon procedures project with a state education agency by coordinating with 14 higher education institutions
- Planned and executed the audit and led staff auditors for Employee Benefits Plan audits

BACKGROUND:

- Bachelor of Science, Accounting, Towson University
- Associate of Business Administration, Harford Community College

SAMPLE ELECTRONIC PROJECT WORKBOOK

Project Name City of X Project Y

Identification Number N/A

Description of the Project:

Agreement with the ABC, Inc., a nonprofit organization, to manage and administer the City's Coronavirus Relief Fund allocation for the purpose of distributing CARES Act funds to local community service providers.

Description	Expenditure Category	Eligible Use Category	Funding Amount				Comments
			6/1/2020	9/2/2020	2nd Amendment, no date	Total Funds Awarded	
Staff Costs & Fringe	EC 2.1	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	6/1/20 Comments inserted by date
Equipment	EC 2.1	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	6/1/20 Comments inserted by date
Food Procurement	EC 2.1	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	6/1/20 Comments inserted by date
Administration	EC 7.1	Public Health/Negative Economic Impacts	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	6/1/20 Comments inserted by date
			\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	

Use of Funds

Please provide a description of the intended use of funds, strategies designed to ensure maximum program's impact and how it connects with the City's intended use of the funds. Please explain how the program objectives benefits the City on each of the following areas (select those that apply):

Public Health (EC 1):

As relevant, describe how funds are being used to respond to COVID-19 and the broader health impacts of COVID-19 and the COVID-19 public health emergency.

Utilize Coronavirus Relief Funds to expand its emergency food assistance efforts throughout the City. Funds will be utilized for staff costs, small equipment purchases and food procurement to support food pantries and food assistance efforts throughout the City, with priority given to developing consistent food assistance efforts in high needs areas identified in partnership w/the Corporation.

Most of the funds were used to purchase food (dry, canned and produce) to supplement donated and government foods to support emergency feeding organizations (from Final Report to ACDS).

Negative Economic Impacts (EC 2):

As relevant, describe how funds are being used to respond to negative economic impacts of the COVID-19 public health emergency, including to households and small businesses.

Since COVID-19 began, we have seen food insecurity in our community increase and food donations decrease dramatically. During this time of year the AACFB used to serve approximately 5,000 households per month, now we see approximately 22,500 households show up each month for food at our emergency feeding pantries. This need is particularly acute among people who have worked in the gig economy and do not receive unemployment benefits (from Final Report to ACDS).

Services to Disproportionately Impacted Communities (EC 3):

As relevant, describe how funds are being used to provide services to communities disproportionately impacted by the COVID-19 public health emergency.

Unique household or individual data are unavailable at Pantry on the GO or Fresh Food Fridays food distributions due to limited intake at pantries due to COVID. (All numbers are approximate as we have not yet received all of the monthly reports for December 2020).

Premium Pay (EC 4):

As relevant, describe the approach, goals, and sectors or occupations served in any premium pay program. Describe how your approach prioritizes low-income workers.

No mention of any premium pay provided to essential workers.

Water, sewer, and broadband infrastructure (EC 5):

Describe the approach, goals, and types of projects being pursued, if pursuing.

No mention of any water, sewer and broadband infrastructure projects being pursued.

Revenue Replacement (EC 6):

Describe the loss in revenue due to the COVID-19 public health emergency and how funds have been used to provide government services.

Funds were also used to purchase computers and telephones necessary to track and ensure systems stay up and running during Covid. Funds were also used to increase staff to keep up with the increasing demand by hiring temporary workers to replace the Detention Center workers who no longer able to leave the prison due to Covid (from Final Report to ACDS).

The next level of service

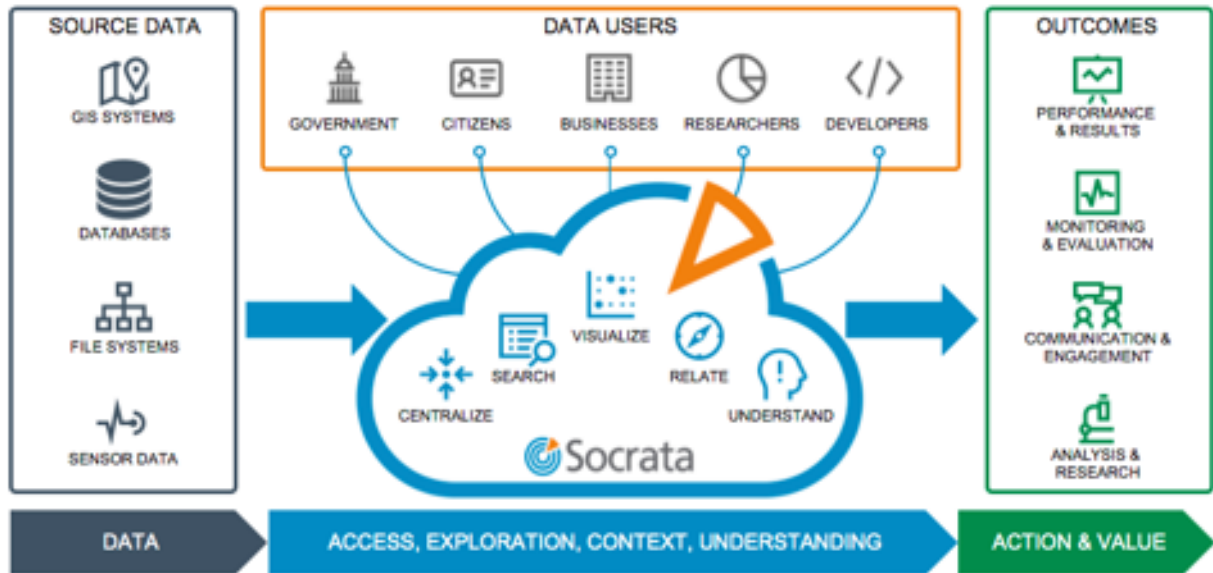
<p>Promoting Equitable Outcomes Describe efforts to to promote equitable outcomes, including how programs were designed with equity in mind. This section should include a description of how the City will consider and measure equity at the various stages of the program, provide your responses in the sections below:</p>
<p>A) Goals: Are there particular historically underserved, marginalized, or adversely affected groups that you intend to serve within the City? No mention of any efforts made to benefit underserved, marginalized, or adversely affected groups.</p>
<p>B) Awareness: How equal and practical is the ability for residents or businesses to become aware of the services funded by the SLFRF? No mention of any efforts to made to increase City residents or business awareness of services funded by the SLFRF.</p>
<p>C) Access and Distribution: Are there differences in levels of access to benefits and services across groups? Are there administrative requirements that result in disparities in ability to complete applications or meet eligibility criteria? No mention of any data on the levels of access to benefits and services available.</p>
<p>D) Outcomes: Are intended outcomes focused on closing gaps, reaching universal levels of service, or disaggregating progress by race, ethnicity, and other equity dimensions where relevant for the policy objective? No mention of intended outcomes from the project.</p>
<p>Additional Information - Selected Expenditure Categories This section should describe how the City's planned or current use of funds prioritizes economic and racial equity as a goal, names specific targets intended to produce meaningful equity results at scale, and articulates the strategies to achieve those targets. The initial report must describe efforts to date and intended outcomes to promote equity. Each annual report thereafter must provide an update, using qualitative and quantitative data, on how the recipients' approach achieved or promoted equitable outcomes or progressed against equity goals during the performance period. Please also describe any constraints or challenges that impacted project success in terms of increasing equity. In particular, this section must describe the geographic and demographic distribution of funding, including whether it is targeted toward traditionally marginalized communities. In addition, this section should explain how the City's overall equity strategy translates into the specific services or programs offered by your jurisdiction for the following expenditure categories:</p>
<p>Negative Economic Impacts (EC 2): This includes assistance with food, housing, and other needs; employment programs for people with barriers to employment who faced negative economic impacts from the pandemic (such as residents of low-income neighborhoods, minorities, disconnected youth, the unemployed, formerly incarcerated people, veterans, and people with disabilities); and other strategies that provide disadvantaged groups with access to education, jobs, and opportunity.</p> <p>Approximately 150,000 households or 400,000 individuals were assisted through Cares funding with emergency food by AACFB Emergency Food Partners. This includes 91,000 HH or 165,000 individuals at Pantry on the Go in partnership with Youth and Family Partnerships: 13,000 HH through Fresh Food Fridays in partnership with the Depart. Of Aging and Disabilities and 43,000 unique HH or 233,000 individuals at Emergency Pantries throughout AA City. There was a significant increase since COVID-19. Prior to COVID-19, the AACFB served approximately 25,000 individuals or 5,000 families a month. During COVID-19, we have served over 55,000 individuals or 22,000 families a month. We collect the data using forms as the clients are coming in to receive food/goods then we enter that info into an Excel database system or reports are submitted to Youth and Family Partnerships who in turn report data to the AACFB. In the beginning it was challenging to obtain a regular source of food to purchase the volume of food needed for each event, but since that time we have been able create new accounts with various vendors to purchase food with CRF funds to fill in gaps. These funds also provided warehouse labor to process the necessary food to meet the increased need of our City residents. Our pantries continue to report an increase in need. Financial hardship takes time to recover, we expect the need to continue for six to twelve months after we get through the COVID pandemic. We are extremely grateful to receive \$1.375 million to continue efforts through AA City for the next six months. Additional funds may be needed over the next six months which we are actively working to secure. Since COVID began the AACFB has distributed over 4 million pounds of food to those in need. In FY20 the AACFB distributed 2.6 million pounds of food. The need has grown exponentially and with the supportive funding through ACDS and AA City the AACFB has been able to meet these needs and ensure food was available (from Final Report to ACDS).</p>
<p>Services to Disproportionately Impacted Communities (EC 3): This includes services to address health disparities and the social determinants of health, build stronger neighborhoods and communities (e.g., affordable housing), address educational disparities (e.g., evidence-based tutoring, community schools, and academic, social-emotional, and mental health supports for high poverty schools), and promote healthy childhood environments (e.g., home visiting, child care). No mention of intended outcomes from the project.</p>

<p>Other Information Required</p> <p>Community Engagement :</p> <p>This section should describe how the City’s planned or current use of funds incorporates written, oral, and other forms of input that capture diverse feedback from constituents, community-based organizations, and the communities themselves (EC 3). Where relevant, this description must include how funds will build the capacity of community organizations to serve people with significant barriers to services, including people of color, people with low incomes, limited English proficient populations, and other traditionally underserved groups.</p> <p>No mention of community engagement efforts made.</p>	
<p>Labor Practices :</p> <p>This section should describe the workforce practices on any infrastructure projects being pursued (EC 5), including how are projects using strong labor standards to promote effective and efficient delivery of high-quality infrastructure projects while also supporting the economic recovery through strong employment opportunities for workers. For example, this section should report whether any of the following practices are being utilized: project labor agreements, community benefits agreements, prevailing wage requirements, and local hiring.</p> <p>Hiring of resources was performed to address increase in providing food and services, however, there's no data on labor standards and/or other metrics to ensure it was effective and efficient.</p>	
<p>Use of Evidence :</p> <p>The Recovery Plan should identify whether SLFRF funds are being used for evidence-based interventions and/or if projects are being evaluated through rigorous program evaluations that are designed to build evidence. The City must briefly describe the goals of the project, and the evidence base for the interventions funded by the project. The City must specifically identify the dollar amount of the total project spending that is allocated towards evidence-based interventions for each project in the Public Health (EC 1), Negative Economic Impacts (EC 2), and Services to Disproportionately Impacted Communities (EC 3) Expenditure Categories.</p> <p>There's no data on evidence-based interventions and/or evaluations made of programs available.</p>	
<p>Reporting Requirements</p> <p>The Recovery Plan must include key performance indicators for the major SLFRF funded projects undertaken by the recipient. The City has flexibility in terms of how this information is presented in the Recovery Plan, and may report key performance indicators for each project, or may group projects with substantially similar goals and the same outcome measures.</p> <p>The initial report should include the key indicators above. Each annual report thereafter should include updated data for the performance period as well as prior period data, and a brief narrative adding any additional context to help the reader interpret the results and understand the any changes in performance indicators over time. To the extent possible, Treasury also encourages recipients to provide data disaggregated by race, ethnicity, gender, income, and other relevant factors.</p>	
<p>Required Performance Indicators and Programmatic Data:</p> <p>While the City has discretion on the full suite of performance indicators to include, a number of mandatory performance indicators and programmatic data must be included. These are necessary to allow Treasury to conduct oversight as well as understand and aggregate program outcomes across recipients. This section provides an overview of the mandatory performance indicators and programmatic data. This information may be included in the City’s Recovery Plan as they determine most appropriate, including combining with the section above, but this data will also need to be entered directly into the Treasury reporting portal. Below is a list of required data for each Expenditure Category:</p>	
<p>Household Assistance (EC 2.2 & 2.5) and Housing Support (EC 3.10-3.12):</p> <ul style="list-style-type: none"> •Number of people or households receiving eviction prevention services (including legal representation) _____ •Number of affordable housing units preserved or developed _____ 	<p>No mention of housing assistance efforts to prevent eviction nor how many housing units preserved/developed.</p>
<p>Negative Economic Impacts (EC 2):</p> <ul style="list-style-type: none"> •Number of workers enrolled in sectoral job training programs _____ •Number of workers completing sectoral job training programs _____ •Number of people participating in summer youth employment programs _____ 	<p>No mention of job sectoral job trainings provided nor summer youth employment programs provided.</p>
<p>Education Assistance (EC 3.1-3.5):</p> <ul style="list-style-type: none"> •Number of students participating in evidence-based tutoring programs _____ 	<p>No mention of evidence-based tutorial programs being offered.</p>
<p>Healthy Childhood Environments (EC 3.6-3.9):</p> <ul style="list-style-type: none"> •Number of people or households receiving eviction prevention services (including legal representation) _____ •Number of affordable housing units preserved or developed _____ 	<p>No mention of eviction prevention services being offered.</p>

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TECHNOLOGY ENABLED SOLUTION APPROACH

The Socrata Connected Government Cloud (SCGC) platform offers a single and secure platform for data analysis and reporting. It allows users to simply create dashboards and reports with drill-down capabilities and filtering options based on established metadata. The platform offers self-service data visualization options and built-in governance and security controls that can be configured to all unique requirements and use cases that arise within the Town.



Data as a Service

SCGC is a Data as a Service (DaaS) platform that creates a single, central and secure system of engagement for our customers' data. The platform gives users the ability to quickly and easily manage the entire data lifecycle, including the ability to:

- Pull in data from siloed systems into a single source of truth through ETL and data automation;
- Clean data by automatically identifying errors and outliers;
- Import and add metadata to create strong data governance;
- Share data with select teams and users;
- Find relevant data through a robust search experience;
- Notify users of important changes to data through notifications and alerts;
- Visualize, filter, and drill into data.

Discover - The SCGC platform includes numerous features that will assist users in discovering datasets and assets related to a specific ARPA project. The solution provides a data portal that will serve as the gateway for the stakeholders, partners, and teams of users – allowing them to share datasets and assets securely with other stakeholders and the public. From the portal, users can discover featured content and datasets in a guided format or use the built-in search tools to quickly discover assets in the Socrata data catalog. The catalog will give Town staff the ability to promote featured content, and it provides numerous options to discover data and data assets by filtering on one or more metadata categories, asset types, or tags. Additionally, users can sort data by recently updated, recently added, most accessed, most relevant, and alphabetically. Our search function looks

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across all data asset metadata and provides users with autocomplete to assist in their discovery process. Once the dataset or asset is discovered in the catalog, users can access the metadata primer page, which includes all metadata, data dictionaries, attachments, table previews, and any related content created from the dataset.

Access - From the same metadata primer page described above, users can access the Socrata API endpoints created for every dataset and power data into their analytical tools of choice for BI/AI/ML and other downstream uses. They can create visualizations in Socrata, export data, create filtered views, subscribe to alerts, communicate with the dataset owner, share on social media, and embed into other websites for widespread data access.

Collaborate – Socrata Perspectives serves as a collaboration canvas for users to bring together their analytics insights with narrative to communicate amongst and between stakeholders. Users can place Socrata-powered visualizations on a story and enrich them with textual narration; add third party content like images, videos and advanced visualizations or models from third party tools for BI/AI/ML; and publish the finished story to internal or external audiences. They can also quickly create new stories in an intuitive interface with drag-and-drop capabilities. Authors can write and edit their stories in draft mode, auto-save their changes, configure the look and feel of their stories through a variety of fonts and customizable styles, and collaborate with other users and teams throughout the entire process. Stories help governments and data experts connect the dots between policy and outcomes, showcasing data and insights only they can provide.

Recovery Insights Platform

As our country works to close the chapter on the coronavirus pandemic, UHY and Tyler Technologies are actively helping government leaders address the residual economic impacts. Leaders in state and local governments have a strategic responsibility for their jurisdictions’ recovery, but resources and time are lacking. They need insights right away, without costly systems integrations or in-house technical resources.

Tyler Recovery Insights™ delivers leading indicator data to state and local government leaders for targeted and equitable recovery. This solution packages the most authoritative, third-party economic data in the world in an intuitive interface, which allows our customers to derive insights on day one and benchmark against their peers. It also gives our customers the ability to integrate administrative data with leading economic data and share insights across the enterprise. In addition to third-party data, the Town can also add additional, critical information (e.g., financial information, ERP data, HR data, etc.) to provide an even broader view of its economic recovery.

 <p>Leading economic data</p> <ul style="list-style-type: none"> • Mobility • Small business revenues • Consumer spend 	 <p>Insights on Day 1</p> <ul style="list-style-type: none"> • Pre-configured indicators in intuitive interface • Fully automated data pipeline • Benchmark to peers 	 <p>Connected to operations</p> <ul style="list-style-type: none"> • Integrate with own internal data • Share across enterprise • Connect data to action with alerts
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Tyler Recovery Insights includes:

- Metrics pre-configured in an intuitive interface;
- On-the-fly analysis with industry breakouts;
- Maps with data aggregated by census tract;
- Weekly updates; and
- Exportable data for flexible analysis.

and helps to answer critical questions about the economic effects of the pandemic, including:

- *How many businesses have closed?*
- *How will I track business recovery to a pre-COVID baseline?*
- *Which sectors need the greatest assistance?*
- *How can economic recovery be highlighted in terms of our neighborhoods?*
- *How has consumer consumption changed?*
- *Which neighborhoods have been particularly slow to return to business?*
- *Which sectors are falling behind others? Which are doing well?*
- *Which neighborhoods are suffering the most economically?*
- *Is there a misalignment between local supply and demand?*
- *How does one area compare to peer / competitor jurisdictions?*

Our proposed solution will directly benefit the short-term assessments and strategic planning needs, as well as common challenges that governments have in accessing and deriving value from key data.

I. Leading Economic Data that is Highly Granular

Tyler Recovery Insights combines Safegraph for Mobility Metrics; Womply for Small Business Revenue Metrics; and Affinity Solutions for Consumer Spend Metrics - which are used collectively to accelerate recovery with leading economic and operational data. All data is available at the census tract level, is updated at least monthly, and can be broken down by industry.

Safegraph for Mobility Metrics

- Are my residents returning to civic life?
- Which businesses and neighborhoods are receiving the most foot traffic?

Womply for Small Business Revenue Metrics

- What are the small business revenue trends in my jurisdiction?
- Which neighborhoods and industries have been most affected by the pandemic?

Affinity Solutions for Consumer Spend Metrics

- How has consumption changed as a result of the pandemic?
- Does my consumer demand match supply in my community?

ERP, HR, other data sources. As mentioned above, our Insights platform can be connected to other critical data sources for the Town that might hold key information of data to assist with this project. This Insights platform would provide Town Executives and other key personnel, a consolidated view of financial data they can use to help drive insights round the ARPA Project.

II. Ready on Day One

Recovery Insights is fully ready on Day One with an intuitive interface, fully automated data pipelines, and benchmarking capabilities:

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Fully automated data pipeline. Governments face hurdles in the mechanics of obtaining third-party data and engineering a sustainable data pipeline. Socrata Recovery Insights solves that problem by automating all ETL workflows to ensure that the data is ready to go on the customer's platform and is exportable to other formats.

Out-of-the-box analytics. Socrata Recovery Insights eliminates weeks of analyst time by providing the following, out-of-the-box analytics for governments:

- Preconfigured, best practice metrics so that users can derive insights from the data on day one.
- Third party data that can complement a government's own operational data for a holistic view of their recovery.
- The ability for users to dive into the data and segment it by census tract or by industry code so that they can drill down on how the data affects different segments differently.
- Users can set up personalized bookmarks, proactive alerts, and even power projections so they can anticipate where the data is heading.
- Collaboration is easy through sharing of metrics and bookmarks.

III. Connected to Operations

Our solution allows for seamless integration with internal data; the sharing of insights across the enterprise; and the ability to connect data to action with alerts. These features are invaluable to governments seeking to drive better economic outcomes for their communities through the lens of strategic and equitable recovery.

CIVIL SPACE

Civil Space is an accessible hub for engagement and collaboration—built by strategists, designers, and developers who believe that responsibly-designed technology can empower meaningful change.

True digital engagement is so much more than broadcasting and collecting feedback. With Civil Space, engagement is the town hall reimagined. A robust, nimble, accessibility-compliant suite of digital engagement tools designed for sharing community-driven ideas, Civil Space is built to educate and provide context, raise engagement levels, and harness the feedback that matters.

Launched by Domain7 for clients across Canada, the United States, and the United Kingdom, Civil Space is built upon decades of Domain7's experience researching, designing, and developing digital solutions for civic and public sector clients.

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Collaboration is Creation

You get better ideas when working together, not apart. Civil Space provides a trusted, welcoming digital home in which to meet and collaborate.

Engagement is Iterative

Establish ongoing cycles of informed dialogue and timely reporting, and build trust with your community.

Context is Critical

Civil Space integrates with and comes alongside your in-person engagement efforts, providing audiences with a full spectrum of robust outreach activities.

Trust Starts With Data

Safeguard your participants' data, and reassure them with Civil Space's robust privacy measures.

Empathy Builds Consensus

Build empathy and consensus through visibility, dialogue, and context-sharing.

Design Thinking Adapted

Our toolset is informed by the proven tenets of effective design thinking: ensuring that context, definition, and ideation lead to consensus.

Inform

Effortlessly build project hubs that give your community a home base for their content and context

Consult

Collect meaningful, actionable feedback from your participants

Involve

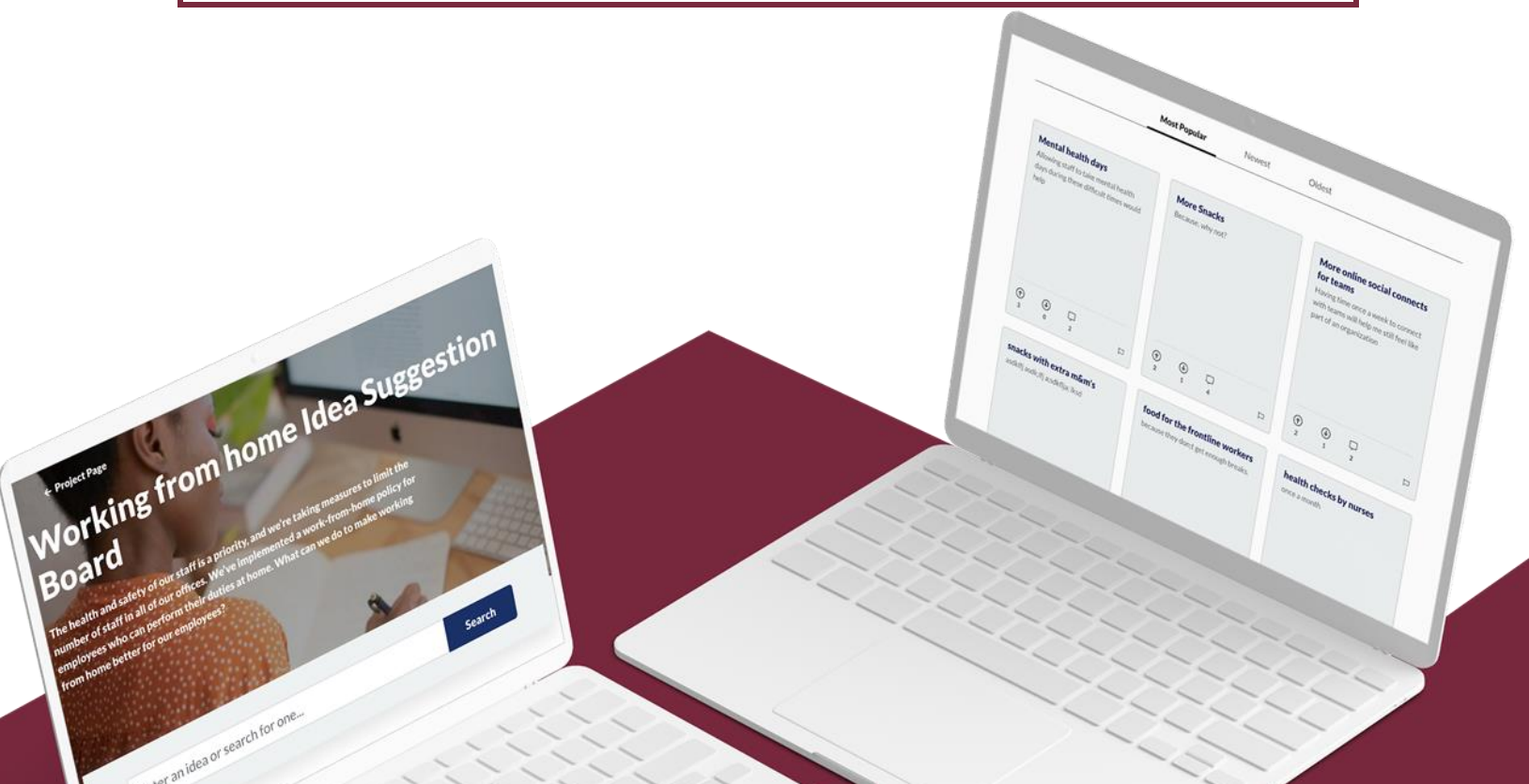
Step up your engagement practice by bringing community members opportunities to educate, gather feedback, and collaborate throughout the process.

Collaborate

Bring citizens together to start conversations, identify tensions, and build bridges

Report

Build trust and accountability with your communities by uncovering actionable insights, then close the loop by sharing what you've learned and what's going to be done.





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