Workshop:
Filing a Federal
Disaster Procurement
Flight Plan

Tuesday, May 10, 2022
10 a.m. - 1 p.m.

Choice Partners Member Meeting
Kemah, TX 77565
Filing a Federal Disaster Procurement Flight Plan

**Learning Objectives:**

At the conclusion of this session, participants will be able to:

- Understand the process for conducting “most restrictive procurement rule” analysis
- Formulate a plan to create checklists and other supporting documentation/forms for federal grant compliance
- Develop a strategy for sourcing and pre-positioning emergency procurement equipment and services utilizing a mix of sourcing methods (cooperative purchasing, local bids, etc.)
- Utilize a tool for conducting a federal grant procurement After-Action Review
- Identify potential projects that can be supported by various sources of federal disaster funding.

The training policies of Disaster Recovery Services, LLC, can be found at the following link:

[https://www.disastersllc.com/assets/DRS_Learner_Training_Policies.pdf](https://www.disastersllc.com/assets/DRS_Learner_Training_Policies.pdf)
Filing a Federal Disaster Procurement Flight Plan

Presenter Disclosure
Shelley Vineyard, MBA, NIGP-CPP, RTSBA

Relevant Financial Relationships:
• Is employed by Disaster Recovery Services, LLC, and receives a salary

Relevant Non-Financial Relationships:
• Currently serves on the NIGP Business Council

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• Understand the process for conducting “most restrictive procurement rule” analysis;
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Student Pilot Mistakes:
Costly Federal Procurement Missteps

Recent Costly Procurement Missteps

Creating the Flight Plan:
Emergency Procurement Preparedness
Determine Your Path Under Uniform Guidance (UG)

State Entity
- Follow the same policies and procedures as with non-federal funds. (2 CFR 200.317)
- Comply with Procurement of Recovered Materials (2 CFR 200.323)
- Take Socioeconomic Affirmative Steps (2 CFR 200.321)
- Domestic Preferences for Procurement (2 CFR 200.322)
- Prohibition on Contracting for Covered Telecommunications or Services (2 CFR 200.216)
- No awards to suppliers/contractors suspended or debarred from federal contracting

Non-State Entity
- Follow 2 CFR 200.318 – 327, Appendix II
- General procurement standards
- Competition
- Methods of Procurement (micro, small, sole, SAT, emergency, non-competitive)
- Socioeconomic Affirmative Steps
- Domestic Preferences for Procurements
- Procurement of Recovered Materials (state and political subdivisions of state)
- Cost/Price analysis for procurements over SAT
- Bonding Requirements
- Prohibition on Contracting for Covered Telecommunications or Services
- No awards to suppliers/contractors suspended or debarred from federal contracting

Most Restrictive Rule
Non-state Entities
Non-state entities must follow the most restrictive of federal vs. state vs. local requirements.

Including:
- Thresholds for competitive procurement.
- Formal Procurement Methods
- Bonding Requirements
- Public Posting/Advertising Procedures
- Absence of Local Preference as Evaluation Factor (except for A&E Services)

Developing a Pre-Flight Checklist: Emergency Procurement Preparedness
1. Develop Standard Operating Procedures for disaster procurement. Include forms and process maps.
2. Create checklists for every level and type of purchase.
3. Determine contract addenda that incorporate all required federal terms and conditions.
4. Create bid templates for supplies/equipment/services funded by federal grant dollars.
5. Develop process procedures and instructions for documenting affirmative socioeconomic steps.
Sourcing Gap Analysis

- High-dollar, high-frequency purchase categories needed for disaster response
- Pre-awarded contracts
- Go-to purchasing co-ops that are aligned with 2 CFR 200 requirements

What do we have in place?

What do we need?

What's the plan to get there?

Filing the Flight Plan:
Preparing End-Users Regarding Roles and Responsibilities

- Determine/assign disaster response roles and responsibilities within the Procurement Department
- Work with other departments/divisions to identify roles and responsibilities of internal stakeholders that will be part of the disaster procurement process
- Provide annual disaster procurement training for all ‘crew’ members identified – SOPs, forms, etc.

Who’s On Your FEMA Flight Crew?
Roles to Consider

- Overall Claim Lead
- Financial Lead
- Physical Repairs Lead
- Onsite Project Coordinator
- Procurement Lead
- Reporting Lead

Don’t rely on the org chart to determine the best resources to fill out the disaster response crew.
Identify those who are willing to become subject matter experts not only within their assigned function, but also for overall disaster responses.
Optimal financial recovery requires a crew working toward the same goals.
Flight Simulation

Procurement Tabletop Exercises
- Prepare the Scenarios
- Test the Communications Plan
- Test the Operating Procedures
- Modify the Disaster Procurement Plan As Needed
- Test the Checklists
- Conduct an After-Action Review

After-Action Review
INTRODUCTION

- Abundant sources of disaster-related federal funding
- Familiarity with the scope of funding leads to better decision making not only for recovery, but for future resilience
Traditional PA Program
- Debris Removal
- Emergency Protective Measures
- Permanent Work
  - Repair (to original condition)
  - Replace (50% Rule)

Alternate Projects
The Applicant may determine that the public welfare is not best served by restoring the function of the damaged facility.

Alternate project funding may be requested to put toward a different facility or facilities.

Alternative Procedures Projects
- Offers maximum flexibility
- Can be used across all Permanent Work
- Fixed-Cost Offer Negotiated with FEMA
- Can use excess funds for other PA-eligible activities

Improved Project
- Improvements to a damaged facility not required by eligible codes or standards
- Funding limited to lesser of Federal share of approved estimate to restore to pre-disaster design or Federal share of the actual costs of completing improved project
- Examples:
  - Laying asphalt on a gravel road
  - Replacing a firehouse that had two bays with one that has three bays
FEMA Hazard Mitigation Grant Program

- FEMA doesn't like to pay for things twice
- Funding is made available for projects that will reduce future losses
- Elevation of structures, infrastructure protection, retrofitting, hazard mitigation planning

Section 406 Projects

- Mitigation of Incident Caused Damage
- Constructing Floodwalls
- Installing New Drainage
- Adding Fire Suppression Systems
- Dry Floodproofing

Section 404 Projects

- Multi-hazard, Statewide mitigation
- Available for damaged and non-damaged facilities
- Based on percentage of dollars obligated for PA and IA programs

Building Resilient Infrastructure and Communities (BRIC)

BRIC aims to shift the federal focus away from reactive disaster spending and toward research supported, proactive investment in community resilience.

- Eligible states, territories, and tribal governments may apply
- FY2021 up to $18 million available (State/Territory $5M - $1M per applicant)
- Cost Share (typically 75% Fed/25% NFE)
Community Development Block Grant (CDBG) funding provides annual grants on a formula basis to states, counties, and cities to develop viable communities with decent housing, create or sustain suitable living environments, and expand economic opportunities, principally for low- and moderate-income persons.

**CDBG Disaster Recovery (CDBG-DR)**
- Flexible
- Allows communities to rebuild disaster-affected areas
- Broad range of recovery activities
- Funds can be used to cover remaining portions of qualified projects after insurance and FEMA disbursements

**CDBG Mitigation (CDBG-MIT)**
- Appropriated by Congress in 2010
- Carry out high-impact activities that will mitigate risks and reduce future losses
- Funded activities are to increase resilience to and decrease impact of future disasters
**CDBG Coronavirus (CDBG-CV)**

- Made available August 2020 to prevent, prepare for, and respond to Coronavirus
- Allows communities to implement economic development and small business assistance activities
- Allows direct assistance to for-profit businesses that benefit the community

- $2500 to state, local and Tribal governments
- Fight pandemic and support recovery from economic impacts
- Maintain vital public services
- Build a strong, resilient, and equitable recovery

**HEERF III**

- $39.6B to support higher education needs
- At least 1/2 must be used for emergency financial aid grants to students
- Remainder can be used for institutional purposes
**ARP ESSER III**
- $122B to state educational agencies and school districts
- $2.75B to nonpublic schools

To name a few uses:
- Safe reopening and sustain the safe operation of schools
- Academic supports
- Social Emotional Supports
- Capital Improvements

**IIJA**
Infrastructure Investment and Jobs Act
- $550B in new spending over 10 years
- Mixture of entitlement and competitive grant programs
- Recipients will differ based on the program

- Broadband
- Cybersecurity
- Transportation
- Utilities and Environmental
Resiliency Flight Paths

Questions?

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THANK YOU
Filing a Federal Disaster Procurement Flight Plan

Workshop Learning Activities
When expending federal grant and loan funds, local governments are required to follow their “own documented procurement procedures which reflect applicable state, local, and tribal laws and regulations, provided that the procurements conform to applicable Federal law and the standards identified in this part.” (2 C.F.R. §200.318(a)) In other words, local governments must comply with the “most restrictive” procurement requirements of both federal and state law as well as their own local policies.

**Activity:** County ‘X’ wants to align its disaster response/recovery procurement processes with the requirements of the FEMA Public Assistance (PA) Grant, governed by the Uniform Guidance found at 2 C.F.R. § 200.317-327. The County is a local government and is considered a non-state entity as a FEMA PA Grant applicant. Assist the County in determining the “Most Restrictive Rule” (2 C.F.R. §200.318 (a)) of federal vs. state vs. local policy for the following areas:

### Procurement Methods

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<th>State</th>
<th>County ‘X’</th>
<th>Most Restrictive</th>
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<tr>
<td><strong>Micro-Purchase:</strong></td>
<td>Below $10,000</td>
<td>Under $50,000</td>
<td>$0 – $7,499.99</td>
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<td>No competition required</td>
<td>No competition required</td>
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<td><strong>Small Purchases:</strong></td>
<td>$10,000 - $250,000</td>
<td>$50,000 and above</td>
<td>$7,500 - $49,999</td>
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<td>Minimum of three quotes</td>
<td>Formal Competitive Bid,</td>
<td>2 written quotes</td>
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<td>Competitive Proposal, or</td>
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<td>Reverse Auction</td>
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<td><strong>Above simplified acquisition threshold (SAT) of $25,000</strong></td>
<td>Formal Sealed Bid or Competitive Proposals</td>
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### Bonding Requirements – Construction/Public Works

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<th>County ‘X’</th>
<th>Most Restrictive</th>
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<tr>
<td>Bonds</td>
<td>Required for projects over SAT:</td>
<td>Counties: may require bid bond for 5% of the total contract price for public works contracts. Required: performance bond if the contract is in excess of $100,000; and payment bond if the contract is in excess of $25,000.</td>
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<td>• Bid bond of 5% of bid price; and</td>
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<td></td>
<td>• Performance and payment bonds for 100% of contract price</td>
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### Socio-economic Contracting

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</table>
| Procedures: take affirmative steps to encourage small and minority firms and women-owned business participation (but no preferences), including **all** the following:  
  - Include on solicitation lists  
  - Solicit when such firms are potential bidders  
  - Divide total contract requirements where economically feasible to enable more minority participation  
  - Establish delivery schedules to encourage participation  
  - Use SBA and Minority Business Development Agency of US Dept. of Commerce  
  - Require prime contractors to take the same affirmative steps. | Not required for county governments | It is the policy of County ‘X’ to involve certified HUBs to the greatest extent feasible in the County’s procurement of goods, equipment, services, and construction projects while maintaining competition and quality of work standards. |
Emergency Disaster Response Sourcing Gap Analysis

Millions of dollars can flow out the door leading up to and immediately responding to a catastrophic event.

Listed below and on the next page are common categories of emergency disaster response contracted services, equipment, and supplies.

**Activity:** Identify the categories that your organization **does not** currently have under competitive award.

**Services**

- Boiler Repair Services
- Carbon Monoxide, Gas, or Radiation Detection Services
- Custodial Services
- Debris Monitoring Services
- Debris Removal Services
- Disaster Mitigation & Restoration Services
- Document Restoration Services
- Elevator Repair Services
- Environmental Services
- Fencing Services
- Fire Equipment Services
- Flooring Services (Temporary)
- Fuel and Fuel Transportation Services
- Generator Maintenance/Repair Services
- Generator Rental Services
- Glass Repair Services
- Heavy Equipment Rental Services
- HVAC Services
- IT Disaster Recovery Services
- Job Order Contracting Services
- Language/Interpreter Services
- Locksmith Services
- Major Mechanical Equipment Services
- Moving Services
- Office Equipment Rental
- Overhead/Rolling Door Repair Services
- Plumbing Services
- Power/Electrical Services
- Refrigeration/Freezer Repair Services
- Roofing Services
- Salvage Services
- Security Camera & System Repairs
- Small Engine/Equipment Repair Services
- Storage Rental
- Stormwater Services
- Temporary Office Rental
- Temporary Road & Drive Repairs
- Temporary Security Services
- Temporary Warehousing Services
- Timekeeping System Repair Services
- Towing Services
- Transportation Services
- Vehicle Repair Services
- Waste Management Rental Services
- Waste Management Services
- Welding Services

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For the services identified:

- Can these services be provided by in-house staff during emergency response?
- If ‘no’, how do you plan to put pre-positioned contracts in place that will meet 2 C.F.R. 200 procurement requirements?

If disaster struck today, could you identify your ‘go to’ cooperative purchasing contract that aligns with 2 C.F.R. 200 procurement requirements?

Do you know what additional steps you would need to take for compliance should you choose a cooperative purchasing contract?
Emergency Disaster Response Sourcing Gap Analysis

Equipment and Supplies

- Air Compressors
- Machine Oils and Lubricants
- Air Conditioning Units
- Medical and First Aid Supplies
- Air Movers/Dryers
- Modular Buildings
- Air Quality Testers
- Pallet Jacks
- Auto Parts and Supplies
- Portable Power Packs
- AV Equipment
- Portable Toilets
- Backup Power Units
- Pressure Washers and Sprayers
- Barricades
- Safety and Security Signs
- Batteries
- Safety Equipment and Clothing
- Blowers & Ventilators
- Satellite Phones
- Cabling and IT Equipment
- Security Cameras
- Ceiling Tiles
- Sewage Ejectors
- Cell Phones
- Small Hand Tools
- Chain Saws
- Spill Response Kits
- Computers/Laptops/Back up Batteries
- Storage Units
- Custodial Equipment
- Sump Pumps
- Degreasers
- Tarps and Plastic Sheeting
- Dehumidifiers
- Temporary Directional Lighting
- Disinfectants
- Tent Canopies
- Dumpsters
- Tires
- Environmental Sorbents
- Traffic Cones
- Fans
- Trailers
- Fencing
- Two-Way Radios
- Food and Water Coolers
- Voltage Detectors
- Fuel - gasoline, diesel, biodiesel
- Water Extraction Equipment
- Fuel - Propane
- Water Pumps
- Furniture Carts
- Welding and Cutting Machines
- Generators
- handheld work lights
- Ice makers
- Ladders
- Lifts & Carts
- Light Bulbs

For the equipment/supplies identified:

What’s your plan for sourcing these items pre- or post-event?

If disaster struck today, could you identify your ‘go to’ cooperative purchasing contract that aligns with 2 C.F.R. 200 procurement requirements?

Do you know the additional steps you would need to take should you choose a cooperative purchasing contract?
‘Winging it’ is not likely to result in a successful recovery from catastrophic events. Identifying critical roles and responsibilities of the disaster response/recovery team (internal and external), is essential to optimizing your organization’s recovery and resiliency.

Every organization is unique in its internal capacity and skill set to effectively respond/recover from catastrophic disasters and it is critical to identify both internal and external team members who will effectively carry out all phases of the recovery plan.

The overarching role of the strategic team is to take a big picture approach to assessing the needs of the organization for both recovery and future resiliency, identifying all available sources of funding, understanding risks to optimal recovery funding, and ensuring all stakeholders in the recovery process understand roles, responsibilities, and critical compliance issues.

**Activity:** Place an ‘x’ next to the key ‘crew’ member roles that should be part of your organization’s strategic disaster recovery team. Explain why each role is essential to optimize recovery and resiliency.

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<tr>
<th>Role</th>
<th>Strategic Team (x)</th>
<th>Why?</th>
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<td>Other:</td>
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Who’s On Your Disaster Recovery ‘Flight Crew’?

Now that you’ve identified your Strategic Team, identify other ‘crew’ members, both internal and external, who will contribute to the designated phases of disaster recovery.

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<tr>
<td>FEMA Subject Matter Expert</td>
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<tr>
<td>Other:</td>
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Federal Disaster Grant Procurement After-Action Review

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**Federal Disaster Grant Procurement After-Action Review**

<table>
<thead>
<tr>
<th>Assessment Factor</th>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. The purchasing department was included early on in disaster recovery planning.</td>
<td>1</td>
<td>2</td>
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<tr>
<td>b. Our end-users knew that federal procurement rules applied to disaster-related purchases.</td>
<td>1</td>
<td>2</td>
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<tr>
<td>c. We knew what type of applicant we would be for FEMA public assistance funding (i.e., state entity, local government, private non-profit)</td>
<td>1</td>
<td>2</td>
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<tr>
<td>d. We had an easy way to segregate and track disaster-related purchases.</td>
<td>1</td>
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<tr>
<td>e. We knew how to apply the most restrictive of federal, state, and local procurement rules to our federal disaster grant purchases.</td>
<td>1</td>
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<td>f. Our process for checking for federal suspension and debarment ensured we were not awarding to vendors who were prohibited from participating in federal contracts.</td>
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<td>g. We had a way to easily incorporate required federal terms and conditions with our POs and contracts including emergency purchases.</td>
<td>1</td>
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<td>h. We knew what FEMA would require for the use of pre-awarded contracts that had not been procured according to federal standards.</td>
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<td>2</td>
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<tr>
<td>i. We had a process in place to conduct a cost/price analysis for all disaster purchases that exceeded the simplified acquisition threshold of $250K.</td>
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<td>2</td>
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<tr>
<td>j. We knew that FEMA requires a written justification for each use of the emergency/exigent non-competitive procurement exception. (local government and PNPs)</td>
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<td>2</td>
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<tr>
<td>k. Our organization was well-prepared to follow federal procurement and contracting requirements in order to protect our federal disaster grant reimbursement dollars.</td>
<td>1</td>
<td>2</td>
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<tr>
<td>l. We were easily able to pivot to the use of non-traditional sourcing methods and suppliers to overcome supply chain challenges</td>
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<td>2</td>
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**Note:** If you need additional support in working through this Procurement After-Action Review, please contact us:

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# Federal Grant Disaster Procurement Improvement Plan

<table>
<thead>
<tr>
<th>Area of Improvement</th>
<th>Corrective Action</th>
<th>Responsible Party</th>
<th>Status</th>
<th>Estimated Completion Date</th>
</tr>
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