

Statewide Analysis and Revision of Ohio's State Energy Security Plan

Proposal for the Ohio Department of Development, Office of
Energy and Environment
Hagerty Consulting, Inc.

Request for Proposals #DEV23OEE01
Due January 9, 2023 at 2:00PM EST

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Executive Summary

Hagerty Consulting, Inc. (Hagerty) appreciates the opportunity to submit the following proposal to support the Ohio Department of Development, Office of Energy and Environment (OEE) with analysis and revision of Ohio's State Energy Security Plan (SESP). Hagerty is an emergency management and homeland security consulting firm dedicated to helping clients like OEE prepare for, respond to, and recover from disasters and other emergencies. The Hagerty team is equipped with a deep understanding and knowledge of the energy sector, the Midwest region, and emergency management. Our unique blend of energy sector experience and statewide emergency preparedness, planning, and response expertise positions Hagerty to execute and deliver a successful project to meet the expectations identified by OEE and new criteria for SESP's included in Section 40108 of the *Infrastructure Investment and Jobs Act* (IIJA) being implemented by the United States (US) Department of Energy (DOE).

Hagerty has experience and capabilities that support key aspects of the Ohio SESP update. These include energy security initiatives, regional and statewide emergency preparedness efforts, subject matter expertise in mitigation and resiliency planning and risk assessment and management, energy equity research, federal grant management, and large-scale stakeholder engagement plan development and implementation that targets public and private energy sector entities, emergency management and energy associations, as well as federal, state, local, and tribal government partners. Examples of previous work include supporting state energy offices and state emergency management agencies prepare for regional petroleum shortages, developing and conducting an exercise series for an investor-owned utility in Southern California, and developing the North American-wide Grid Security Exercise (GridEx) VI alongside the North American Electric Reliability Corporation (NERC).

- » **Experience engaging public and private energy stakeholders in complex emergency planning.** Updating Ohio's SESP will require targeted and meaningful engagement with stakeholders across the energy sector, from rural electric cooperatives to pipeline owners and operators. Hagerty's work developing GridEx VI demonstrates our ability to coordinate and collaborate with energy stakeholders across the nation. Working in partnership with two national laboratories, state and federal government, and almost 300 participating utilities, cooperatives, and commissions, Hagerty elicited cyber and physical security considerations from participating organizations to develop a realistic energy security exercise. Hagerty's previous experience working with stakeholders in Ohio includes supporting Ohio's largest public safety and counter-terrorism exercise in history, centered in Columbus, Ohio. This required working with federal, state, and private partners – each with overlapping interests – to develop a county-wide multi-agency plan as well as a multi-day intelligence and information sharing exercise. Our experience working with public and private energy stakeholders across the nation as well public safety stakeholders in Ohio makes Hagerty uniquely equipped to manage the complex stakeholder engagement effort that will be required to develop an effective SESP for Ohio.
- » **Strategic reduction of community risks.** Energy security is an issue that affects all communities in Ohio. Updating Ohio's SESP to mitigate against and prepare for impacts to the whole community will require

an understanding of energy equity in Ohio, the exacerbated effects of climate change on vulnerable communities, and whole community mitigation planning. Since 2013, Hagerty has been engaged by New York City (NYC) Emergency Management (NYCEM) to support recovery operations as a result of Hurricane Sandy, which currently tops \$15 billion in recovery funding across multiple federal agencies. Our work includes extensive support for hazard mitigation programs, supporting NYC to maximize funding and build resilience during recovery. Hagerty has also supported an energy equity project in Washington, D.C. sponsored by the National Science Foundation, which included steering the project's advisory council, coordinating the technical, policy, and financial components of the research project, and preparing a grant for additional funding to address energy equity in the region. The Hagerty team knows the strategic reduction of community risks, from responding to humanitarian crises to mitigating the impacts of climate change on underserved communities. Effective mitigation planning and energy equity research will strengthen the State's SESP by reducing community-wide risk and aligning OEE's work to additional federal funding opportunities related to energy equity.

- » **Strategic planning and implementation with energy and critical infrastructure partners.** Effective energy security planning will require expertise in energy assurance, other critical infrastructure sectors, and their interdependencies. Hagerty is currently supporting the New Mexico Energy, Minerals and Natural Resources Department Energy Conservation and Management Division with updating the New Mexico SESP. Hagerty has also supported the National Emergency Management Association (NEMA), the DOE, and the National Association of State Energy Officials (NASEO) in the development of materials designed to explore energy assurance planning, policies, and procedures on a regional basis in response to prolonged energy impacts. In addition, Hagerty has worked with Southern California Edison (SCE) and their state and federal partners for the past three years to exercise resilience in the face of physical, cyber, and natural incidents impacting the grid. This exercise series has included engagement from private and public partners in oil and natural gas, telecommunications, transportation, and other critical sectors. More widely, Hagerty has worked with an investor-owned utility in Texas to develop storm response plans, and supported continuity planning for communities seeking energy resilience following Winter Storm Uri in Texas.

Hagerty specializes in providing solutions for our clients' most complex problems by analyzing existing policy, identifying options, and assisting to execute solutions. The proposed Hagerty team has been developed to provide highly qualified, versatile, and experienced support services and resources to OEE. The approach captures the tasks articulated in the Request for Proposals (RFP) and will strengthen Ohio's SESP in accordance with the DOE's IIJA SESP requirements, in addition to requirements of the State. The Hagerty team is committed to delivering an SESP that reduces community-wide risks and addresses energy equity in Ohio, bolstering OEE's relationships with private and public partners in the State and wider region, and identifying IIJA funding opportunities that will continue to strengthen Ohio's energy security and meet Governor DeWine's clean energy objectives.

Staffing Plan

Hagerty's internal organizational structure consists of four Divisions: Preparedness, Mitigation, Response, and Recovery. These Divisions combine to support clients like OEE, particularly related to significant strategic and planning guidance. **We call this the One Hagerty approach.** The success of any project is directly related to the people assigned to it. At Hagerty, the leadership of the firm is directly involved in key staffing decisions to ensure our management teams have the requisite experience as well as the intangible components necessary to create a team with synergy.

Hagerty intends to draw from the team presented below to execute on the scope of services and will tailor the staffing plan to meet OEE's resource needs with qualified individuals from our pool of over 500 full-time employees and more than 1000 independent consultants. Hagerty understands that any substitution of staff members assigned to the engagement will be discussed with OEE, and no action will be taken without OEE's permission. **Detailed resumes inclusive of similar project experience, education, expertise, qualifications, and training experience have been provided as an attachment to this section for reference by OEE.**

PATRICK VAN HORNE, PROJECT EXECUTIVE, is an experienced project manager and emergency management professional with a proven record of successful leadership in the public and private sectors over the past 16 years. With extensive experience writing and implementing operational plans, designing and executing exercises, and facilitating training and professional development programs, Mr. Van Horne has led projects for Hagerty with SCE, the Electricity-Information Sharing and Analysis Center (E-ISAC), the Colorado Division of Homeland Security and Emergency Management, the State of California, and many other local government and private sector clients.

Prior to joining Hagerty, Mr. Van Horne co-authored the book, *Left of Bang: How the Marine Corps' Combat Hunter Program Can Save Your Life*, served as an emergency manager for the Office of Emergency Management in Boulder, Colorado, and has provided training in behavioral analysis and threat recognition to military, law enforcement, and security professionals. This experience has guided his current work, where he leads Hagerty's Preparedness Division's portfolio of projects in the energy, transportation, security, and emergency management sectors, working with clients and team members to develop resilience to the disruptions that impact organizations and communities.

JONATHAN DAVIS, PROJECT MANAGER, is Hagerty's Energy Sector lead, driving the firm's preparedness and planning activities with energy sector clients, including NERC and investor-owned utilities. He is an experienced policy advisor and project management professional with five years' public service working on national security initiatives with the British Government. Prior to that, he spent two years in the private sector advising multinational corporations and high-net-worth individuals on security and political risk. Mr. Davis has worked with clients across the energy, health, public safety, and transport sectors to support their preparedness for and response to disasters. Mr. Davis supported the E-ISAC GridEx VI, an international grid security, emergency, and response exercise with over 10,000 players across North America. **Mr. Davis has also supported Ohio's largest public safety full-scale exercise**, functional exercises with a transport client in the District of Columbia, and public safety workshops with law enforcement and fire partners. In addition,

he has led a series of executive engagements in the energy and health sectors, developing and facilitating discussions to draw out strategic priorities to drive future business resilience and emergency response efforts.

KATIE TOSKEY, LEAD PLANNER, is a senior managing associate and project manager within Hagerty's Preparedness Division. Ms. Toskey has a background in government relations and external affairs. Prior to joining Hagerty, she worked as a government relations and external affairs manager for the United Service Organizations (USO), the nation's premier military service organization, where she served in a lead role of a successful congressional lobbying effort that permanently increased an annual federal grant the USO receives through the US Department of Defense from \$20 million to \$24 million and was awarded the USO President's Award, the organization's highest form of recognition, for this achievement. Ms. Toskey has worked for two members of the US Congress and the governors from Michigan and North Carolina where she developed a sophisticated knowledge of state and federal regulatory and legislative processes. She has worked on a range of public policy issues including energy, emergency management, homeland security and healthcare and has directly supported state energy and emergency management agencies. Ms. Toskey is an effective project manager with excellent communication, writing, and leadership skills. She is a proactive and rapid relationship developer with individuals across wide audiences within an organization and among outside stakeholders. Ms. Toskey currently serves as Hagerty's project manager for the update to New Mexico's SESP.

ANTHONY HURLEY, SUBJECT MATTER EXPERT, is a consultant specializing in utility operations, emergency management, business continuity planning, and physical security. Mr. Hurley has worked with critical infrastructure, government, industry association, and tribal clients throughout the continental US, Alaska, Canada, the Caribbean, and the Middle East. He is presently serving Hagerty as a subject matter expert (SME) on projects to update New Mexico's SESP and to deliver resilience planning to the Texas Medical Center in Houston, Texas. Prior to retirement, Mr. Hurley celebrated 37 years in the utility sector, serving in five electric utilities operated by FirstEnergy in three states (Ohio, Pennsylvania and New Jersey). He retired in 2017 as Vice President of Operations for an electric utility that served 1.1 million customer meters, where he managed an operations workforce of 1,250 professional and represented employees.

DANIELA THOMAS, ASSISTANT PLANNER, is an emergency management professional with experience in emergency preparedness including special event emergency planning, exercise development, training and hazard mitigation. Additionally, she has a strong background in Geographic Information Systems (GIS) and data visualization. Ms. Thomas began her career as a Homeland Security Fellow at the Philadelphia Office of Emergency Management (OEM). There she supported a variety of tabletop exercises including the Army vs Navy Game and Philadelphia Marathon. While at Philadelphia OEM, Ms. Thomas assisted in the publication of research for the Naval Postgraduate School surrounding exploring the possibilities of terrorism consequence models as public safety planning tools. Ms. Thomas then transitioned into a role at the Delaware Valley Intelligence Center to support their cyber division from potential threats towards the Novel Coronavirus (COVID-19) Vaccine Cold Supply Chain. Currently, Ms. Thomas is an associate in Hagerty's

Preparedness Division, supporting a diverse array of clients to improve their emergency management capabilities including supporting the update to New Mexico's SESP.

KRIS LEDINS, ADVISOR, is an emergency management professional with over ten years of experience as a project manager, subject matter expert, and planner in emergency preparedness and public safety. He has successfully developed, implemented, and managed a diverse cross-section of preparedness and response initiatives (e.g., assessments, plans, trainings/exercises, after-action reports [AARs]) for federal, state, local, and private-sector partners. Mr. Ledins employs his knowledge of industry best practices, real-world response operations, emerging technologies, and data analytics to consistently deliver innovative, actionable, and scalable solutions for his clients. Mr. Ledins currently serves as the project executive on the NYC Surge Support contract with Hagerty where, over the past two years, he has managed the mobilization and management of over 200 response professionals providing COVID-19 response/recovery support in various capacities to the City. Mr. Ledins also oversees several additional efforts, including the NYC Urban Area's annual Threat and Hazard Identification and Risk Assessment (THIRA)/Stakeholder Preparedness Review (SPR) process and serves as an SME in evacuation and shelter-in-place preparedness operations for the Federal Emergency Management Agency (FEMA).

MORGAN JOHNSON, ADVISOR, is a highly regarded emergency management expert with over 18 years of experience at the confluence of public health and emergency management — serving in key preparedness, response, and recovery roles on contracts spanning local, state, federal, and private sector health and emergency response entities. With a strong background in public health, Ms. Johnson is a sought-after SME for pandemic planning, response, and recovery, with experience in strategic planning and field operations for pandemic response. Her past work assignments include serving as a key member of the NYC Department of Health and Mental Hygiene's emergency response team during the 2009 H1N1 influenza pandemic. During the COVID-19 pandemic, Ms. Johnson has applied her public health and emergency management subject matter expertise to support COVID-19 response in the City of Baltimore and has managed after-action review efforts for the State of Oregon and the City of Baltimore. She has also served as project manager for the development and deployment of the FEMA Platform for Understanding Lifeline Stabilization of the Economy (PULSE), currently used as a forecasting tool for post-COVID-19 economic recovery.

Resumes

Education

- » Master of Business Administration, Fordham University, 2014
- » Bachelor of Science in Business Administration, Marist College, 2005

Training and Certifications

- » Graduate of State of Colorado Emergency Management Academy
- » Advanced Professional Development Series, FEMA
- » FEMA/Emergency Management Institute Incident Command System courses IS-100, 200, 300, 400, 700, 800; IS- 230, 235, 240, 241, 242, 244; G-191, 235, 358, 557, 775

Relevant Highlights

- » Disaster Response Volunteer with Team Rubicon since 2012 with deployments in response to Hurricane Sandy and multiple flood and wildfire response operations in Colorado
- » Company Executive Officer and Platoon Commander during two United States Marine Corps (USMC) deployments to Iraq
- » Authored book selected for the 2017 USMC Commandant's Professional Reading List

Professional Biography

Mr. Patrick Van Horne is an experienced project manager and public servant with a proven record of successful leadership in emergency and disaster management over the past 16 years. With extensive experience writing and implementing operational plans, designing and executing exercises, and facilitating training and professional development programs, Mr. Van Horne has the knowledge and skills to support an organization's capability development programs and initiatives. Mr. Van Horne has worked with clients at the city, county, state, and federal levels of government, led preparedness projects with publicly traded and privately held businesses spanning quick service restaurants to electric utilities, and supported non-profit organizations. He is skilled at facilitating planning meetings, workshops, exercises, and coordination meetings to achieve organizational objectives and advance project planning requirements.

As a Deputy Director at Hagerty Consulting, Inc. (Hagerty), Mr. Van Horne provides leadership and management of programs in support of the division's operations and growth, including managing a team of consultants who serve clients in the transportation, energy, security, municipal government, and state government sectors. Prior to joining Hagerty, Mr. Van Horne served as a Program and Project Manager for the Boulder County, Colorado Office of Emergency Management, where he oversaw the Boulder Incident Management Team (IMT). Notably, he collaborated with 15 part-time project managers to execute the 85-person Type 3 IMT's strategic plan. He also led the Resource Management Section during the activation of the Emergency Operations Center (EOC) to respond to the Novel Coronavirus (COVID-19).

Mr. Van Horne served seven years in the United States (US) Marine Corps (USMC) and co-authored "Left of Bang: How the Marine Corps' Combat Hunter Program Can Save Your Life." He serves as a volunteer leader with Team Rubicon.

Relevant Professional Experience

Project Manager | North American Electric Reliability Corporation GridEx VI Electricity-Information Sharing and Analysis Center Continuity | Hagerty Consulting, Inc.

- » Led a team of emergency management consultants in the design and delivery of a webinar series supporting more than 280 North American utility companies and government entities.

Patrick Van Horne

Project Executive



- » Led a team of exercise planners to develop and deliver a tabletop exercise (TTX) for over 100 corporate executives and senior government leaders to simulate the response to a nation-state cyberattack on the North American electrical grid.

Project Manager | Santa Barbara County, California Continuity of Operations Plan | Hagerty Consulting, Inc.

- » Led a team of emergency management consultants to conduct a Baseline Assessment of the County's continuity of operations (COOP) capability, including document review, townhall meetings, survey development, and reporting.
- » Led a team of emergency managers to develop the County's COOP Plan, four incident-specific annexes, and more than 20 department or division continuity plans.

Emergency Management Consultant | National Emergency Management Association, Mutual Aid Support System Outreach Campaign | Hagerty Consulting, Inc.

- » Developed the curriculum and supported the delivery of a webinar series designed to teach Resource Providers how to develop Mission Ready Packages (MRP) in the Mutual Aid Support System (MASS). Developed the curriculum and supported the delivery of a train-the-trainer webinar series designed to prepare State Emergency Management Assistance Compact (EMAC) Coordinators and Training Officers to deliver MRP workshops in their respective states.

Principal Investigator | Transportation Research Board, ACRP 10-28: Practical Guide for Integrating Crisis Management and Business Continuity | Hagerty Consulting, Inc.

- » Led a research team of emergency management and airport operations experts to develop an actionable guidebook that supports airport to integrate business continuity and crisis management programs.
- » Designed, developed, and implemented a Pilot Program initiative to validate the guidebook's concepts through workshops, guided discussions, and TTX with four United States (US) airports of various sizes.

Program and Project Manager | Boulder, Colorado Office of Emergency Management

- » Responsible for developing and managing capabilities for five program areas and enhancing the disaster readiness of Boulder's (City and County) government departments, public safety organizations, and partners.
- » Served as program manager for the Boulder IMT. Oversaw 15 part-time project managers to execute the 85-person Type 3 IMT's strategic plan.
- » Led the development of a mass fatality plan, including facilitation and stakeholder engagement through plan adoption.
- » Developed monthly training sessions, created standard operating procedures (SOPs), and supported software development to enhance the EOC's resource management capability.
- » During Boulder's COVID-19 Pandemic Response, led the Resource Management Section to support and fulfill nearly 1,500 resources requested through the EOC. Developed a supply chain for personal protective equipment (PPE) and other critical resources, integrating public sector organizations, private sector businesses, and nonprofits.

Disaster Response Volunteer | Team Rubicon

- » Deployed in support of the Hurricane Sandy response in New York City (NYC) and throughout Colorado to support multiple flood and wildfire response, recovery, and mitigation operations.
- » Served as the Boulder City Team Leader and built a team to execute two wildfire recovery projects in 2017, resulting in a community impact of over \$30,000 through more than 2,000 volunteer hours.

Patrick Van Horne

Project Executive



Training Team Officer in Charge | United States Marine Corps

- » As a Captain, served as the lead instructor in situational awareness and behavioral analysis, developing curriculum, designing exercises, and conducting after-action reviews with units returning from Iraq and Afghanistan.
- » Designed and implemented the Combat Hunter Trainer Course to expand the number of qualified instructors and improve cross-cultural communication to deploying Marine battalions.

Company Commander, Executive Officer, and Platoon Commander | United States Marine Corps

- » Led 350 Marines through a yearlong combat training program prior to their deployment to Afghanistan.
- » Served as the second-in-command for 200 Marines through a pre-deployment training program and deployment to Iraq.
- » Led 40 Marines through a condensed pre-deployment training program and through a deployment to Iraq.

Employment History

Hagerty Consulting, Inc., Deputy Director of Preparedness, 2022 to Present

Hagerty Consulting, Inc., Senior Managing Associate, 2020 to 2021

Boulder Office of Emergency Management, Program and Project Manager, 2018 to 2020

The CP Journal, Co-Founder, 2011 to 2018

United States Marine Corps, Platoon Commander/Company Executive Officer/Company Commander/Training Team Officer in Charge, 2005 to 2012

Presentations and Publications

Left of Bang: How the Marine Corps' Combat Hunter Program Can Save Your Life, Van Horne, Patrick, Riles, Jason, Black Irish Books, 2014

A Guidebook: Integrating Business Continuity and Crisis Management at America's Airports, National Academies of Science/Transportation Research Board/Airport Cooperative Research Program, (Pending)

Education

- » Master of Arts, Security & Development Studies, King's College London, UK
- » Bachelor of Arts, History, University of Edinburgh, UK

Training and Certifications

- » Agile Project Management Practitioner
- » FEMA IS-100, 200, 700, 800, 230

Relevant Highlights

- » Deputy Project Manager, GridEx VI E-ISAC
- » Lead Planner, GridEx VI Southern California Edison
- » Lead Planner, Hunter Seeker, Franklin County OEM, Ohio
- » Lead Planner, Executive Tabletop, California Department of Public Health
- » State Department IVLP alumnus (City of Los Angeles)
- » Grey Shirt, Team Rubicon UK
- » Private Secretary for National Security to the Home Secretary, UK Government
- » Persian Gulf Crisis 2019 response, UK Government

Professional Biography

Mr. Jonathan Davis is an experienced policy advisor and project management professional, with five years' public service working on national security initiatives with the British Government. Prior to that he spent two years in the private sector advising multinational corporations and high-net-worth individuals on security and political risk. Mr. Davis currently supports Hagerty's energy, public safety, and transport planning, exercise, and business continuity initiatives.

Mr. Davis has worked with clients across energy, health, public safety, and transport sectors to support their preparedness for and response to disasters. Mr. Davis supported the Electricity Information Sharing and Analysis Center's (E-ISAC) GridEx VI, an international grid security, emergency, and response exercise with over 10,000 players across North America. Mr. Davis has also supported Ohio's largest public safety full-scale exercise, functional exercises with a transport client in the District of Columbia, and public safety workshops with law enforcement and fire partners.

Mr. Davis has led a series of executive engagements in the energy and health sectors, developing and facilitating discussions to draw out strategic priorities to drive future business resilience and emergency response efforts. His approach is informed by experience at the executive level with the British Government.

While with the UK Government Mr. Davis worked closely with international partners. Mr. Davis was selected to partake in the State Department's International Visitor Leadership Program (IVLP) exchange to the City of Los Angeles, where he explored local terrorism prevention efforts and was hosted by the city's Emergency Operations Center. As a Senior Policy Advisor Mr. Davis regularly engaged with law enforcement counterparts in the U.S., Canada, and Western Europe. In 2015 Mr. Davis spent two months as a Summer Researcher at Temple University's Tokyo campus.

Relevant Professional Experience

Deputy Project Manager | Electricity Information Sharing and Analysis Center, GridEx VI Distributed Play and Executive Tabletop | Hagerty Consulting, Inc.

- » Supported the North American Electricity Reliability Corporation's (NERC) E-ISAC in developing and delivering the two elements of GridEx VI.
- » The Distributed Play portion involved over 10,000 players across North America. Mr. Davis supported the development of an exercise framework and core materials to support distributed and asynchronous play spanning two days.

Jonathan Davis

Project Manager



- » Managed the Executive Tabletop, a six-hour discussion between electricity sector executives and government leaders, including representatives from the White House, the Cybersecurity and Infrastructure Security Agency, and Canadian Government, facilitated by Hagerty Executive Chairman Brock Long.

Lead Planner | Southern California Edison, GridEx VI Crisis Management Council | Hagerty Consulting, Inc.

- » Developed a tabletop exercise for Southern California Edison's executive leadership. Through a series of engagement meeting with Edison Electric Institute and the Department of Energy's Office of Cybersecurity, Energy Security, and Emergency Response, Mr. Davis supported an exercise that challenged executives and explored some of the most pressing grid resilience issues, such as the issuance of Grid Security Emergency orders.

Lead Planner | Franklin County Office of Emergency Management, Hunter Seeker Intelligence and Information Sharing Exercise | Hagerty Consulting, Inc.

- » Developed a bespoke four-day intelligence and information sharing exercise for public safety professionals and private and public sector partners across Ohio and Indiana, including multiple fusion centers and federal players.
- » The design incorporated emerging public safety issues, such as domestic violent extremism, and an extended development process ensured the hundreds of unique injects and thousands of simulated social media inputs exercised and stretched individual and organizational capabilities.

Strategy & Liaison Lead | Counter Terrorism Policing UK, Desistance & Disengagement Program | UK Government

- » Assisted operational partners in the design and delivery of a project that saw a multi-million-dollar investment to improve the supervision and management of terrorists who had been released from prison.
- » Demonstrated ability to test proposals and identify interagency conflict and inefficiencies that could impede operational delivery, including adapting delivery in response to the pandemic to ensure continuity of a national security program.

Policy Lead | Counter Terrorism Policing North West, Project Dovetail | UK Government

- » Conceptualized the regional delivery of a pilot program whereby responsibility for an element of counter terrorism case management was transitioned from Counter Terrorism Policing North West to over 20 local government administrations in the north west region of England.
- » Close stakeholder engagement and an appreciation of the link between strategy and delivery was crucial to the success of the pilot.

Training Developer | College of Policing, Project Hydra | UK Government

- » Developed bespoke tabletop exercises using Hydra, an immersive learning tool for law enforcement. The training package met the needs of Counter Terrorism Policing, local government, and health and education practitioners, while compressing two-days of course material into a one-day session. The training package was designed to improve interagency working at the local level across England and Wales.

Lead Author | Home Office, Channel Duty Guidance | UK Government

- » Led the update of a national terrorism prevention policy document, requiring close consultation and facilitation with Scottish and Welsh government, 200 local government districts and nine regional counter terrorism units.

Jonathan Davis

Project Manager



- » Led regional engagement workshops to understand and identify gaps in existing policy, testing proposals to ensure frontline practitioners could deliver the strategy in practice.

Lead Trainer | Royal Borough of Kensington & Chelsea, Workshop to Raise Awareness of Prevent | UK Government

- » Developed and delivered a bespoke training package on the risk of radicalization for healthcare professionals, social workers, educators, and police in the local government district.
- » Ensuring these frontline workers understood the risks of radicalization was crucial following several local residents, including children, travelling to Iraq and Syria to fight with Daesh.

Private Secretary for National Security (cover) | Secretary of State for the Home Department | UK Government

- » Covered as the Private Secretary for National Security to the UK's Secretary of Homeland Security. During this two-week period directly supported response to: the seizure of a British-flagged oil tanker in the Straits of Hormoz; the deprivation of a British dual-citizens' British citizenship; and Julian Assange dropping an appeal against his imprisonment.
- » Engaged closely with intelligence agencies, the Foreign and Commonwealth Office, and Ecuadorian and Canadian counterparts to ensure concise, accurate and timely briefing to decision-makers at the highest levels of government.

Responder | Royal Borough of Kensington & Chelsea, Grenfell Tower Fire | UK Government

- » Provided reactive support in response to the Grenfell Tower fire, an incident that killed over 70 residents and left over 100 families homeless in a local social housing tower block.
- » Drew on strong relationships with local community leaders, charities, and faith-based organizations to deliver high-priority provisions to a local mosque where residents were sheltering, followed by providing ongoing support to local charities as they grappled with the aftermath of the incident.

Employment History

Hagerty Consulting, Inc., Senior Managing Associate – Preparedness Division, 2021 to Present

UK Government, Senior Policy Advisor, 2018 to 2020

Royal Borough of Kensington & Chelsea, Project Coordinator, 2016 to 2018

Constellis, Security & Political Risk Analyst, 2015 to 2016

Temple University, Tokyo Campus, Summer Researcher, 2015

Royal United Services Institute, Research Assistant, 2014

Education

- » Bachelor of Arts, International Relations, Michigan State University
- » Montpelier Summit, James Madison University

Relevant Highlights

- » Deep knowledge and understanding of the interplay of local, state, and federal government agencies and organizations
- » Decade of experience in Congressional and state government offices with an emphasis on advocacy for defense and national security needs

Professional Biography

Ms. Katherine Toskey is a senior managing associate and project manager within Hagerty's Preparedness Division. Ms. Toskey has a background in government relations and external affairs. Prior to joining Hagerty, she worked as a Government Relations and External Affairs Manager for the United Service Organizations (USO), the nation's premier military service organization, where she served in a lead role of a successful congressional lobbying effort that permanently increased an annual federal grant the USO receives through the U.S. Department of Defense from \$20 million to \$24 million and was awarded the USO President's Award, the organization's highest form of recognition, for this achievement. Ms. Toskey has worked for two members of the U.S. Congress and the governors from Michigan and North Carolina where she developed a sophisticated knowledge of state and federal regulatory and legislative processes. She has worked on a range of public policy issues including energy, emergency management, homeland security and healthcare and has directly supported state energy and emergency management agencies. Ms. Toskey is an effective project manager with excellent communication, writing, and leadership skills. She is a proactive and rapid relationship developer with individuals across wide audiences within an organization and among outside stakeholders. Ms. Toskey currently serves as Hagerty's project manager for the update to New Mexico's State Energy Security Plan.

Relevant Professional Experience

Planner | National Chain Client, Crisis Management Plan | Hagerty Consulting, Inc.

- » Supported the development of a benchmark analysis and gap analysis of existing crisis management plans for a major national restaurant chain.
- » Revised existing crisis management plan incorporating findings from analyses and stakeholder review sessions for presentation to Executive Leadership.
- » Hagerty designed and facilitated a tabletop exercise (TTX) to train on operational checklists that were developed, and test the applicability of the plan in a real-world scenario.

Governmental Relations and External Affairs Manager | United Service Organizations

- » Served in a highly visible position responsible for developing and enhancing relationships for USO leadership with Congress, the White House, the US Department of Defense (DOD), the US Department of Veterans Affairs (VA), US governors, and state National Guards.
- » Led annual legislative efforts on Capitol Hill including the planning and execution of a successful congressional lobbying campaign that increased an annual grant the USO receives through legislation that funds DOD from \$20 million to \$24 million (20 percent increase) commencing in FY 2021.
- » Awarded the USO President's Award, the organization's highest form of recognition, for increasing legislative funds.
- » Managed the bipartisan and bicameral USO Congressional Caucus which includes over 200 Members of Congress.
- » Produced and delivered communications regarding USO programs and initiatives to increase the public profile of the organization.
- » Cultivated relationships with prospective members.
- » Planned and oversaw all aspects of annual Caucus activities on Capitol Hill including educational briefings and USO care package assembly service projects.
- » Managed the USO Service Council comprised of the spouses of the nation's senior military and government leaders who seek to increase awareness and support for the USO and members of the US Armed Forces and their families.
- » Created and implemented a robust annual agenda including meaningful opportunities for members to interact with senior USO personnel to remain apprised of USO programs and service offerings as well as opportunities for members to participate in USO initiatives and events.
- » Spearheaded strategic special events designed to increase the USO's brand awareness among key stakeholders, including: USO participation at the annual White House Easter Egg Roll and Holiday Open House; a military spouse connection featuring First Lady of the United States Jill Biden; a military spouse care package initiative featuring Second Lady of the United States Karen Pence; the USO's first-ever engagement with governors, governors' spouses and staff and state adjutants general at the National Governors Association Winter Meeting; and the USO Service Member of the Year Awards Ceremony supported and attended by Members of Congress and senior civilian and military leadership from DOD.

Senior Federal Policy Representative | Office of Michigan Governor Rick Snyder

- » Served as a senior representative in the Office of Federal Relations to further the Governor's federal relations strategy and advocate for state priorities at the national level.
- » Staffed and represented the Governor at National Governors Association (NGA) and Republican Governors Association (RGA) meetings and events.
- » Acted as a liaison for the Governor, Cabinet Directors, and other senior administration officials with Congress and executive branch agencies and commissions.
- » Managed a federal policy portfolio that included education, health and human services, emergency management, homeland security, public safety, defense, and veterans' affairs.
- » Served on the Governance Board of a statewide, comprehensive strategy entitled "Protect and Grow," developed to bolster Michigan's critical military assets, including the Michigan National Guard and the state's defense industry.

Katherine Toskey

Lead Planner



- » Served as the Governor's primary liaison with the Michigan Congressional Delegation to provide crisis communications during natural disasters.
- » Provided real-time updates on response and recovery efforts as well as responses to questions and concerns from federal elected officials.
- » Prepared written testimony and staffed the Commander of the Michigan State Police Emergency Management and Homeland Security Division for a congressional hearing entitled "The Future of FEMA: Stakeholder Recommendations for the Next Administrator" in February 2017.
- » Supported the Governor as Co-Chair of the NGA Resource Center for State Cybersecurity.
- » Oversaw the development and implementation of a Resource Center strategy and work plan. Assisted with the writing and publication of white papers highlighting best cybersecurity practices.
- » Served as a member of the Michigan Cyber Executive Team and provided state agency personnel with guidance on federal cybersecurity policy.
- » Served as a member of the Michigan per- and polyfluoroalkyl substances (PFAS) Action Response Team charged with implementing and overseeing a cohesive and comprehensive statewide response to public health concerns posed by PFAS contamination.
- » Led proactive engagement with the Michigan Congressional Delegation and executive branch agencies including DOD, US Environmental Protection Agency (EPA), US Department of Agriculture (USDA), and US Department of Health and Human Services (HHS) to influence federal policy and funding to favorably impacts state efforts to investigate sources of contamination and protect public drinking water.

Federal Legislative Liaison | Office of North Carolina Governor Pat McCrory

- » Promoted and served as a senior representative in the Office of Federal Relations.
- » Staffed and represented the Governor at NGA and RGA meetings and events.
- » Acted as a liaison for the Governor, Cabinet Secretaries, and other senior administration officials with Congress and executive branch agencies and commissions.
- » Assisted with preparation for and participation in congressional hearings including writing testimony.
- » Managed a federal policy portfolio that included education, health and human services, emergency management, economic development, energy, environment, agriculture, transportation, and immigration.
- » Supported the Governor as Chair of the bipartisan Outer Continental Shelf Governors Coalition.
- » Organized and executed annual meetings for members of the Coalition in conjunction with the National Governors Association Winter Meeting in Washington.
- » Facilitated outreach to the North Carolina Congressional Delegation and other stakeholders, including senior officials at the Bureau of Ocean Energy Management, on topics related to exploration, leasing and development of offshore energy resources as well as the Five-Year Outer Continental Shelf Oil and Gas Leasing Program for 2017 to 2022.
- » Supported the Governor and North Carolina Emergency Management personnel for five weeks at the State Emergency Operations Center in Raleigh following Hurricane Matthew in 2016.

Katherine Toskey

Lead Planner



- » Acted as a primary liaison for the Governor with the North Carolina Congressional Delegation, Association of County Commissioners and League of Municipalities to provide real-time updates on hurricane response and recovery efforts as well as responses to questions and concerns from federal, state, and local elected officials.
- » Helped coordinate hurricane response efforts by federal agencies including FEMA, US Department of Transportation (DOT), USDA, US Small Business Administration (SBA) as well as the American Red Cross.
- » Assisted with the creation and submission of a federal funding request to Congress exceeding \$1 billion to assist North Carolina with Hurricane Matthew recovery.

Federal Legislative Assistant | Office of North Carolina Governor Pat McCrory

- » Supported the Office of Federal Relations.
- » Conducted federal legislative and regulatory research.
- » Scheduled and staffed meetings in Washington for the Governor, Cabinet Secretaries, and senior state agency representatives.
- » Disseminated information to the North Carolina Congressional Delegation regarding the Governor's public events, economic development announcements and state legislative updates and responded to constituent inquiries.
- » Led an effort to implement a federal grants management program for North Carolina.
- » Facilitated and participated in a series of meetings with key personnel in state agencies for a preliminary assessment of efficiencies with the federal grants process.
- » Worked with senior officials in the Governor's Office of State Budget and Management (OBM) to implement best practices and augment effectiveness obtaining federal grants throughout the administration.
- » Organized a federal grants management seminar for state employees.
- » Played a key role in the creation and execution of special initiatives, including four statewide events for high school students to promote attendance at the national service academies and three state-federal policy forums hosted by the Governor and Cabinet Secretaries to discuss their legislative priorities with senior staff from the North Carolina Congressional Delegation.

Employment History

Hagerty Consulting, Inc., Senior Managing Associate – Preparedness, 2022 to Present

United Service Organizations (USO), Government Relations and External Affairs, 2018 to 2021

Office of Michigan Governor Rick Snyder, Senior Federal Policy Representative, 2017 to 2018

Office of North Carolina Governor Pat McCrory, Federal Legislative Liaison, 2015 to 2016

Office of North Carolina Governor Pat McCrory, Federal Legislative Assistant, 2014 to 2015

Office of US Representative Jackie Walorski (IN-02), Scheduler/Legislative Correspondent, 2013 to 2014

Office of US Representative Dan Benishek (MI-01), Scheduler, 2011 to 2012

Artemis Strategies and Chrysalis Energy Partners, Associate, 2010

Education

- » Engineering and Surveying Apprenticeship, The Illuminating Company, 1984
- » Civil Engineering Internship, Fisher & Associates, 1980

Training and Certifications

- » Fellow, Institute of Strategic Risk Management, 2022
- » Master Continuity Practitioner, FEMA, 2021
- » Physical Security Professional (PSP®), ASIS International, 2020
- » Crime Prevention through Environmental Design Professional Designation (CPD), National Institute of Crime Prevention, 2018
- » Certified Protection Professional (CPP®), ASIS International, 2016
- » Professional Certified Investigator (PCI®), 2015
- » Master Exercise Practitioner (MEP), FEMA, 2015
- » Advanced Professional Series (APS), FEMA, 2007
- » Professional Development Series (PDS), FEMA, 2006

Relevant Highlights

- » In recognition of career contributions related to hurricanes, Hurley was presented the *2018 Distinguished Service Award* at the 2018 National Hurricane Conference.

Professional Biography

Mr. Anthony Hurley is a consultant specializing in utility operations, emergency management, business continuity planning (BCP), and physical security. Mr. Hurley has worked with critical infrastructure, government, industry association, and tribal clients throughout the Continental United States (CONUS), Alaska, Canada, the Caribbean, and the Middle East. He is presently serving Hagerty Consulting, Inc. (Hagerty) as a Subject Matter Expert (SME) on a project to deliver resilience planning to the Texas Medical Center (TMC) in Houston, Texas (TX). Prior to retirement, Mr. Hurley celebrated 37 years in the utility sector, serving in five electric utilities operated by FirstEnergy in three states (Ohio, Pennsylvania and New Jersey). He retired in 2017, as Vice President of Operations for an electric utility that served 1.1 million customer meters, where he managed an operations workforce of 1,250 professional and represented employees.

Relevant Professional Experience

Subject Matter Expert | Kingdom of Saudi Arabia, (client confidential) | Witt O'Brien's

- » Worked directly with a Kingdom of Saudi Arabia (KSA) ministry to develop emergency management processes and redundancy associated with critical infrastructure.
- » Developed a multi-year training program for all ministry positions, from senior level to frontline employees.

Subject Matter Expert | United States Virgin Islands, Hurricanes Irma and Maria | Witt O'Brien's

- » Served as Power Restoration Advisor to the United States Virgin Islands (USVI) Governor, to accelerate the restoration of island utility infrastructure.
- » Continued USVI assignment by serving on the Board of the USVI Hurricane and Resiliency Task Force, to assist with the development of long-term mitigation and resiliency solutions.

Subject Matter Expert | Hurricane Sandy Mitigation Project | FirstEnergy

- » Led the organization's Hurricane Sandy mitigation project, working directly with state regulators, members of U.S. Congress, and U.S. Senate.

- » Mitigated flooding for 19 substations, implemented a new Incident Management System (IMS), developed storm response training programs and exercises, and incorporated new technology such as Geographic Information Systems (GIS) tracking.

Employment History

Critical Preparedness LLC, Consultant, 2021 to Present

Witt O'Brien's, Managing Director, 2017 to 2021

FirstEnergy, and legacy companies, Vice President of Operations, 1980 to 2017

Publications

"Hurricane Preparedness, Response and Recovery: Is Everybody Ready?", Journal of Business Continuity & Emergency Planning, Winter 2019-2020

Presentations, 2019 to Present

"Hurricane Grid Hardening", T&D World Black Sky Hazards & Grid Resilience virtual conference, November 17, 2021

"Conducting Physical Security Risk Assessments", ASIS Northern New Jersey Chapter monthly meeting, October 2021

"Preparedness and Response to Disasters: Ensuring Eligibility for FEMA Reimbursements", Houston Chapter of the Institute of Strategic Risk Management (ISRM), October 6, 2021

"I need to incorporate Pandemic Planning. Where do I start?", ASIS International/Global Exchange 2021, September 2021

"Natural Disasters!!! When an organization is most vulnerable.", ASIS International, virtual delivery, September 8, 2021

"Emergency Management 101, How do we prepare?", All Hazards Consortium 'Storm School', June 29, 2021

"Conducting Physical Security Risk Assessments", ASIS Austin Chapter monthly meeting, August 12, 2021

"Composite Crossarm and Pole Applications: Tomorrow's Technology Today", American Composites Manufacturers Association, June 23, 2021

"Business Continuity and the Business Impact Analysis", National Hurricane Conference, New Orleans, LA, June 17, 2021

"Hurricane Preparedness, Response, and Recovery in Utilities", ASIS Security Snapshot with 'The Security Guy', May 2021

"FEMA Reimbursement Grant process", Free Webinar, April 29 and May 12, 2021

"Business Continuity Failures", 2020 Continuity Professional of Ohio (CPO) Conference, October 26, 2020

"FEMA Disaster Prep and Filings", 2020 Electric Cities of Alabama, Engineering and Operations Conference, Hoover AL, October 20, 2020

"How to Prepare for Offshore Consulting Assignments", 2020 ASIS GSX (Global Security Exchange), recorded on September 1, 2020, for On-Demand delivery (virtual)

"FEMA's Focus on Mitigation: What Projects should you be Planning on to Harden and Strengthen Systems before Natural Disasters Strike", NRECA TechAdvantage 2020, New Orleans, LA, March 2, 2020

"Best Practices in Disaster Planning, Response and Mutual Aid", The Academy in Southern California Public Power Authority, sponsored by APPA, Glendora, CA, February 19, 2020

"Unity of Effort: Coordinating Cross-sector Restoration in Disasters", Distributech 2020, San Antonio, TX, January 30, 2020

"Introducing the NRECA Hazard Mitigation Toolkit" webinar, sponsored by the National Rural Electric Cooperative Association (NRECA). Delivered from Washington, D.C. on July 24, 2019

"Dynamic Public-Private Partnerships", Partners in Emergency Management Conference, Lynnwood, WA, April 18, 2019

"A Live Exercise in Business Continuity from a Utility War Room Perspective", New Mexico State University, Center for Public Utilities, Santa Fe, NM, April 7, 2019

Education

- » Bachelor of Science, Biological Security and Defense, Drexel University

Relevant Highlights

- » Bilingual: English and Spanish
- » Experience in data visualization through Esri ArcGIS, ArcGIS desktop, and Tableau
- » Experience in programming/databases through Python and MySQL

Professional Biography

Ms. Daniela Thomas is an emergency management professional with experience in emergency preparedness including Special Event Emergency Planning (SEEP), exercise development, training and hazard mitigation. Additionally, she has a strong background in Geographic Information Systems (GIS) and data visualization. Ms. Thomas began her career as a Homeland Security Fellow at the Philadelphia Office of Emergency Management (OEM). There she supported a variety of tabletop exercises including the Army vs Navy Game and Philadelphia Marathon. While at Philadelphia OEM, Ms. Thomas assisted in the publication of research for the Naval Postgraduate School surrounding Exploring the Possibilities of Terrorism Consequence Models as Public Safety Planning Tools. Ms. Thomas then transitioned into a role at the Delaware Valley Intelligence Center to support their cyber division from potential threats towards the COVID-19 Vaccine Cold Supply Chain. Currently, Ms. Thomas is an associate in Hagerty's Preparedness Division, supporting a diverse array of clients to improve their emergency management capabilities including supporting the update to New Mexico's State Energy Security Plan.

Relevant Professional Experience

Homeland Security Fellow | Philadelphia Office of Emergency Management

- » Streamlined operating procedures to be used in emergencies and special events for the City of Philadelphia.
- » Participated in development of emergency management federally funded grant proposals.
- » Analyzed contingency plans to develop a new cybersecurity plan for the City of Philadelphia.
- » Coordinated communications between public safety, health, and other stakeholders in emergency operation centers (EOC).
- » Conducted tabletop exercises in support of improving disaster response.

Research Assistant | Drexel University College of Computing and Informatics

- » Extracted data through YouTube application programming interface (API) in order to analyze specific content within videos.
- » Processed data from interviews regarding social capital and para-social interactions.
- » Obtained collaborative institutional training initiative (CITI) research and ethics certification for Institutional Review Board approval.

Daniela Thomas

Assistant Planner



Intern | Delaware Valley Intelligence Center

- » Developed cyber situational awareness bulletins related to COVID-19 vaccine development and distribution.
- » Performed data collection of phishing campaigns targeting stakeholders involved with vaccine supply chain.
- » Collaborated with law enforcement intelligence analysts surrounding threats in Delaware Valley.

Research Assistant | Drexel University Departments of Politics

- » Analyzed content from Chinese newspaper articles on Black Lives Matter Movement.
- » Identified common themes related to Chinese online discourse of Black Lives Matter Movement.
- » Delivered weekly reporting to faculty to assist in the writing of a journal article.

Employment History

Hagerty Consulting, Inc., Preparedness Associate, September 2022 to Present

Drexel College of Computing and Informatics, Research Assistant, January 2022 to March 2022

Delaware Valley Intelligence Center, Intern, September 2020 to January 2021

Drexel University Department of Politics, Research Assistant, March 2020 to June 2020

Philadelphia Office of Emergency Management, Homeland Security Fellow, September 2019 to May 2020

Education

- » Bachelor of Arts in Philosophy, The George Washington University, 2013

Relevant Experience

- » Over 10 years of experience in emergency preparedness, response, and recovery
- » Oversees mobilization and management of 200+ professionals provided COVID-19 response/recovery support in NYC
- » Expertise in exercise design and implementation, technical assistance, and policy and plan development

Training and Certifications

- » FEMA Professional Development Series
- » FEMA Professional Continuity Practitioner - Level 1
- » Homeland Security Exercise and Evaluation Program (HSEEP)
- » Incident Command System (ICS) 100, 200, 300, 400, 700, 800
- » FEMA, O-305: Type 3 Incident Management Team
- » FEMA, G191: Incident Command Systems/Emergency Operations Center Interface
- » FEMA, G192: Organizing and Managing Local EOCs
- » FEMA, MGT315: Enhanced Threat and Risk Assessment

Professional Biography

Mr. Kris Ledins is an emergency management professional with over ten years of experience as a Project Manager, Subject Matter Expert (SME), Planner, and Analyst in emergency preparedness and public safety. He has successfully developed, implemented, and managed a diverse cross-section of preparedness and response initiatives (e.g., assessments, plans, trainings/exercises, after-action reports) for federal, state, local, and private-sector partners. Mr. Ledins employs his knowledge of industry best practices, real-world response operations, emerging technologies, and data analytics to consistently deliver innovative, actionable, and scalable solutions for his clients.

Mr. Ledins currently serves as the project manager on the New York City (NYC) Surge Support contract with Hagerty Consulting, Inc. (Hagerty) where, over the past two years, he has managed the mobilization and management over 200 response professionals providing Novel Coronavirus (COVID-19) response/recovery support in various capacities to the City. Mr. Ledins also oversees several additional efforts, including the NYC Urban Area's annual Threat and Hazard Identification and Risk Assessment (THIRA)/Stakeholder Preparedness Review (SPR) process and serves as a subject matter expert in evacuation and shelter-in-place preparedness operations for the Federal Emergency Management Agency (FEMA).

Relevant Professional Experience

Project Manager | New York City Emergency Management, New York City Urban Area Threat and Hazard Identification and Risk Assessment/Stakeholder Preparedness Review | Hagerty Consulting, Inc.

- » Developed and implemented a capabilities-based planning approach for 2018, 2019, 2020, and 2021 NYC Urban Area THIRA/SPR efforts which yielded data-driven capability performance models, used to inform strategic planning initiatives.
- » Analyzed federal guidance from the Comprehensive Preparedness Guide (CPG) in coordination with FEMA Region II and National Preparedness Assessment Division (NPAD), and subsequently authored a white paper outlining recommended changes to the THIRA/SPR process to enhance data accuracy/reproducibility.
- » Designed scalable and automated information management systems/tools used to collect and analyze datasets.

- » Facilitated interagency/inter-jurisdictional workshops to streamline data collection and reduce administrative burden.
- » Developed data visualization dashboards to depict capability performance and the impacts of funding on capability delivery.

Project Manager | New York City Emergency Management, Surge Staffing Readiness Support | Hagerty Consulting, Inc.

- » Led all aspects program management and technical delivery including; policy and plan development; training and exercise coordination; personnel management; information and data management; field operations support; and after-action planning.

Project Manager | New York City Emergency Management, COVID-19 Surge Support | Hagerty Consulting, Inc.

- » Developed and managed business processes to identify, mobilize, and manage over 200 professionals to support COVID-19 response/recovery and other missions.
- » Managed all aspects of administrative, logistical, and operational support (e.g., travel, equipment, expenses, communications) for deployed response professionals to NYC.
- » Oversaw project reporting, communications, budgeting, and issue resolution.

Recovery Consultant | City of Panama City, Recovery Action Plan | Hagerty Consulting, Inc.

- » Managed pre- and post-disaster data collection and analysis (e.g., economic, infrastructure) to identify, illustrate, and quantify the direct and indirect impacts of Hurricane Michael on the City.
- » Conducted analysis of dispersed federal grants against impact estimates to generate an Unmet Needs Assessment (UNA) used to justify additional funding requirements from federal agencies such as the United States Department of Housing and Urban Development (HUD).
- » Identified limitations in the methodology used by HUD to calculate unmet needs and constructed the UNA to address the identified limitations (e.g., delays in federal funding allocation resulting in cascading impacts to individual and community recovery timelines).

Emergency Management Consultant | Nassau County, New York Office of Emergency Management Multi-Jurisdictional Multi Hazard Mitigation Plan | Hagerty Consulting, Inc.

- » Managed the development, preparation, and delivery of a Multi-Jurisdictional Multi-Hazard Mitigation Plan (MJMHMP) for Nassau County and participating municipalities.
- » Engaged with the County and all participating jurisdictions and stakeholders to develop a comprehensive understanding of local capabilities, prioritizes, risks and vulnerabilities, all of which was used to develop a functional and feasible strategy to mitigate against the greatest hazards facing the County as well as specific threats to each jurisdiction.

Employment History

Hagerty Consulting, Inc., Deputy Director, 2022 to Present

Hagerty Consulting, Inc., Senior Managing Associate, 2019 to 2022

Hagerty Consulting, Inc., Managing Associate, 2017 to 2019

Booz Allen Hamilton, Senior Consultant, 2015 to 2017

Kris Ledins

Advisor



Touro College - Department of Emergency Preparedness, Senior Emergency Coordinator, 2013 to 2015

Nassau County Village Officials Association, Deputy Emergency Management Specialist, 2013 to 2015

Port Washington Fire Department - Atlantic Hook and Ladder Co. 1, Firefighter & EOC Staffer, 2013 to 2019

George Washington University - Office of Health and Safety, Health and Safety Intern, 2011 to 2013

George Washington University - Emergency Medical Response Group, Crew Chief/Field Training Officer, 2009 to 2013

Education

- » Master of Public Health, Health Behavior & Health Education, University of North Carolina at Chapel Hill, 2005
- » Bachelor of Science in Psychology, College of William & Mary, 2002

Training and Certifications

- » Master Exercise Practitioner Program, FEMA Emergency Management Institute, 2011
- » ICS 100-400, 700, 800
- » Whole Community Economic Recovery
- » Hazus, FEMA Natural Hazards Risk Assessment Program

Relevant Highlights

- » Manager of iterative COVID-19 after-action reviews for local and state departments of health
- » Public Health and Pandemic Planner, Trainer, and Exercise Director since 2005
- » Led design of FEMA program for developing post-disaster economic recovery strategies with applications for COVID-19 response and recovery

Professional Biography

Morgan Johnson is a highly regarded emergency management expert who began her career in front line positions with Public Health Emergency Response groups supporting the State of North Carolina and Federal Emergency Management Agency (FEMA). Ms. Johnson has acquired over 18 years at the confluence of public health and emergency management, serving in key preparedness, response, and recovery roles on contracts spanning local, state, and federal health and emergency response entities as well as private sector stakeholders.

With her specific background in public health, Ms. Johnson is a sought-after Subject Matter Expert (SME) for pandemic planning, response, and recovery, with experience in strategic planning and field operations for pandemic response. Her past work assignments include serving as a key member of the New York City (NYC) Department of Health & Mental Hygiene's emergency response team during the 2019 H1N1 influenza pandemic.

During the current COVID-19 pandemic, Ms. Johnson has applied her public health and emergency management subject matter expertise to support COVID-19 response in the City of Baltimore, as well as managing After Action Review efforts for the State of Oregon and the City of Baltimore. She has also served as project manager for the development and deployment of FEMA's Platform for Understanding Lifeline Stabilization of the Economy (PULSE), in use currently as a forecasting tool for post-COVID economic recovery.

Ms. Johnson also has extensive experience in the development of Geographic Information Systems (GIS) solutions for emergency management planning and response. Since 2003, she has worked with teams to develop GIS-based decision support tools that promote situational awareness and efficient command decisions for emergency managers at the local, state, and federal levels.

Relevant Professional Experience

Preparedness Project Executive | Montgomery County, Texas, Hazard Mitigation Plan Update | Hagerty Consulting, Inc.

- » Manages contract and provides strategic direction to Montgomery County Office of Homeland Security and Emergency Management Planning Team.
- » Provides subject matter expertise in GIS, Hazus and risk mapping along with stakeholder engagement and planning best practices.

Preparedness Project Executive | Salt Lake County, Utah | Hagerty Consulting, Inc.

- » Manages contract and provides strategic direction to Salt Lake County Continuity of Operations Planning Team.
- » Provides subject matter expertise in continuity planning and stakeholder engagement to Planning Team.

Subject Matter Expert | New York City, COVID-19 After-Action Report | Hagerty Consulting, Inc.

- » Leads review of project deliverables for the multi-agency citywide COVID-19 After-Action Review (AAR) for the City of New York from a public health emergency management perspective.
- » Facilitates stakeholder meetings and interviews regarding strengths and areas of improvement in pandemic planning and response and overall city emergency management policies and practices.

Project Manager and Subject Matter Expert | FEMA Office of Business, Industry, and Infrastructure Innovation

- » Developed data platform and reporting requirements to support both blue sky preparedness efforts and emergency response, including California wildfires, Hurricanes Irma and Maria, the Puerto Rico Earthquakes, and COVID-19.
- » Provided situational awareness to agency leadership on current and forecasted economic landscapes and potential courses of action based on a combination of economic, health, and other community data inputs.

Senior Planner | FEMA Region II – Power Outage Incident Annex, Caribbean and Continental United States All-Hazard Plans

- » Led private sector and government stakeholder efforts to identify state and federal critical infrastructure vulnerabilities and priorities for mitigation efforts.
- » Facilitated key stakeholder workshops to develop response Courses of Action and resource surge plans to mitigate cascading impacts of disasters.
- » Worked within and across FEMA regional response teams to develop base plans for response as well as region-specific appendices related to specific critical infrastructure vulnerabilities.

Senior Planner | North Carolina Department of Health and Human Services, County-Level Pandemic Plans

- » Developed 33 Pandemic Influenza Plans for county health departments in North Carolina.
- » Facilitated workshops and small group discussions to identify gaps in local response capabilities based on North Carolina Department of Health and Human Services expectations and existing state pandemic influenza plans.
- » Elevated critical gaps to state officials and worked with local response agencies on proposed solutions.

Training Coordinator | New York City Department of Health and Mental Hygiene

- » Translated City emergency response policies into trainings for agency leadership and staff groups of up to 300.
- » Served as a member of the planning team during emergency deployments.
- » Trained and exercised agency leadership and ground-level staff in emergency management concepts and activities, Incident Command System (ICS), field deployment procedures, and emergency operations center (EOC) protocols.
- » Managed large federal grant for mobile GIS data analysis project for agency media and marketing group. Developed GIS-based solutions for emergency response-related projects. Provided just-in-time training to response personnel.

Project Director | North Carolina Department of Health Bioterrorism Project 516

- » Led transition of state emergency response data collection for the public health sector from paper-based community needs assessments to handheld electronic device data capture, leveraging GIS concepts and technologies.
- » Trained federal, state, and local health agencies on handheld data collection and GIS for public health community assessments and outbreak investigations.
- » Authored book chapter on use of GIS for field epidemiology for Methods in Field Epidemiology.
- » Deployed with post-disaster community assessment teams for Hurricanes Isabel, Charlie, Wilma, and Katrina

Exercise Coordinator and Evaluator | New York University- Langone Health System Enterprise-wide Disaster Exercises

- » Coordinated observer and evaluator activities for multiple hospital-based public health emergency exercises.
- » Developed exercise evaluation guides and trained evaluators on their use.
- » Evaluated exercise data and drafted AAR themes and improvement plans.

Subject Matter Expert and Planning Consultant | Port Authority of New York/New Jersey Emergency Operations and Points of Dispensing Plans

- » Supported development of agency-wide Corporate Emergency Operations Plan, spanning all sectors and business lines of the dual-state entity.
- » Led c-suite meetings to engage relevant parties in planning efforts that encompass the full range of emergency operations from notification and activation to response and recovery.
- » Advised on planning efforts around mass prophylaxis, including points of dispensing and strategic national stockpile deployment.

Employment History

Hagerty Consulting, Inc., Deputy Director of Preparedness, 2022 to Present

Global Meatfree Monday, Inc., President and CEO, 2016 to 2020

SPIN Global, Inc., Senior Managing Consultant, 2018 to 2022

All Hands Consulting, Consultant, 2017 to 2021

Federal Emergency Management Agency, Emergency Response Planner, 2017 to 2021

New York City Department of Education, Chief of Staff, 2016 to 2017

GRACE Communications, Director of Programs & Research, 2011 to 2016

New York City Department of Health and Mental Hygiene, Training Coordinator, 2007 to 2011

North Carolina Division of Public Health Preparedness, Project Director, 2005 to 2007

University of North Carolina at Chapel Hill School of Public Health, Project Director, 2003 to 2005

Harvard School of Public Health Division of Public Health Practice & Center for Bioterrorism, Assistant to the Director, 2002 to 2003

Project Work Plan and Approach

Hagerty is proposing an approach to analyzing and revising Ohio's SESP in accordance with the lessons learned from over 750 projects, including extensive work with energy and utility partners across the U.S. Hagerty will leverage experience in stakeholder engagement, strategic reduction of community risks, and critical infrastructure planning to ensure the updated SESP supports the State's readiness goals, meets the requirements set out by the DOE and the State, and serves the needs of Ohio's residents.

Phase I: Project Kickoff

Our team has found that effective execution of a complex project relies on a shared understanding of the approach and methodology used by the vendor. As such, Phase I focuses on program and project management.

Upon task order execution, Hagerty will develop a draft **Project Management Plan (PMP)**. The PMP will be based upon this proposal and will include an outline of the scope of work; a description of key project milestones and deliverables; an overview of communication tools and methods; and Hagerty's proposed staffing plan for the project. The PMP is a key document at Hagerty, driven by both the Project Management Body of Knowledge (PMBOK), and our internal firmwide quality assurance and quality control (QA/QC) standards. The PMP includes key information to support project execution and delivery of the contract. Fundamentally, the PMP will serve as a tool to establish a mutual understanding of how our team will support OEE's update of Ohio's SESP.

Upon notice to proceed, Hagerty will assemble a project team and begin developing materials for a **Project Kickoff Meeting**. Hagerty's project manager will coordinate with OEE to schedule a 60-minute virtual meeting. In preparation for the Kickoff Meeting, Hagerty will draft a PMP that includes a detailed project approach, project timeline, and Hagerty and OEE roles and responsibilities for the duration of the project. The purpose of the Project Kickoff Meeting will be to validate approaches to contract administration, contract management, task order management, coordination, and initial project tasks. Upon completion of the draft PMP, Hagerty will share the PMP with OEE for review and final approval.

Ongoing Project Management

Hagerty will provide ongoing project management support in alignment with the final PMP. At a minimum, Hagerty recommends this include bi-weekly meetings between the Hagerty project manager and OEE contract manager and monthly meetings with OEE SESP Project Team, a group of key stakeholders who will guide deliverable development. These meetings will focus on the overall planning process, milestones completed, changes to scope, project obstacles, and updates on project logistics. The project manager will monitor project progress and propose updates and changes to the proposed approach when beneficial to the project objectives. Any changes to the project approach in the final PMP will be presented to OEE contract manager for approval.

All deliverables created by Hagerty during execution of the project will be deemed in draft form for review and comment by the OEE contract manager and/or SESP Project Team, as necessary. When documents are deemed final by the OEE contract manager, Hagerty will provide final documents in native format (e.g., Word, Power Point [PPT], Excel) or other agreed upon formats, as identified in this proposal and required through execution of this project. All deliverables will be reviewed and formatted by Hagerty's in-house design team to ensure alignment of branding and overall quality.

OPTIONS FOR REMOTE PARTICIPATION

Hagerty understands engagement with OEE will begin while the State and communities across Ohio are still responding to the ongoing COVID-19 pandemic. The firm offers multiple remote options for stakeholder engagement and meeting facilitation. All Hagerty team members have experience with Zoom, Microsoft Teams, Google Meet, and other virtual meeting platforms. The project manager will work with OEE to identify a platform that OEE is comfortable with and that has the necessary capabilities for virtual coordination.



Deliverables:

Project Management Plan, Virtual Project Kickoff Meeting

Phase Timeline: 2 weeks

Deadline: February 17, 2023

Phase II: Stakeholder Outreach

Ohio's energy sector has significant stakeholders spanning the public and private sectors. The complexity of energy-related emergencies and the diverse set of stakeholders required to support response efforts in Ohio necessitates a comprehensive Stakeholder Engagement Strategy that will be critical to the success of a meaningful SESP update that accurately reflects the energy landscape in the state. In Phase II, the Hagerty team will develop a **Stakeholder List**, **Stakeholder Engagement Strategy**, and **SESP Development Roadmap**, and deliver a **Virtual Stakeholder Kickoff Meeting**.

During this phase, the project team will develop a **Stakeholder List** that identifies stakeholders in Ohio spanning energy production, transmission, distribution, and end-users, in addition to local, tribal, state, and federal government entities and critical infrastructure partners that should be engaged in the planning process. Examples of stakeholders include representatives from Ohio's largest generators, oil and natural gas operators, grid asset owners and operators, military installations, emergency management offices in Columbus and Cleveland, and energy associations representing Ohio's energy sector entities such as the National Rural Electric Cooperative Association and the American Public Power Association. Identified stakeholders will provide critical input to enhance current energy security planning and bolster the project team's ability to tailor the SESP update to best meet the needs of the state and region. The Hagerty team will draw on stakeholders involved in previous and ongoing OEE initiatives, DOE resources, sector

relationships such as NASEO and NERC, and local relationships in Franklin County to develop a comprehensive Stakeholder List.

The Hagerty team will then craft a comprehensive **Stakeholder Engagement Strategy** that outlines the approach the Hagerty team will use to engage stakeholders to establish the importance of the project and their investment of time. The document will also identify project risks related to stakeholder engagement and outline strategies to mitigate those risks throughout the stakeholder engagement process. Understanding that a successful SESP update requires stakeholder candor and willingness to share sensitive information, a priority for the Hagerty team during creation of the Stakeholder Engagement Strategy will be instilling confidence that OEE is the utmost reliable partner. Additionally, the Hagerty team is aware that OEE may be working with the same stakeholders involved in the SESP update on other projects concurrently and will work thoughtfully and deliberately to avoid the potential for stakeholder burnout. The intention for the Stakeholder Engagement Strategy is to eliminate unnecessary or overwhelming stakeholder involvement and continue to strengthen the positive working relationship OEE currently holds with energy sector representatives throughout the state.

In Hagerty's experience with large-scale, complex stakeholder engagement efforts, certain stakeholders may require additional outreach or one-on-one meetings to collect information required for the planning process. Stakeholders may have scheduling challenges or be hesitant to share sensitive information in a larger call setting. For this reason, the Hagerty team will conduct up to 15 one-on-one virtual meetings with key stakeholders throughout the planning process to ensure there is an opportunity to incorporate all relevant information and perspectives into the Ohio SESP. The Stakeholder Engagement Strategy will account for these additional meetings and highlight where in the planning process they could occur, noting there will be flexibility. A majority of these meetings will likely support the State Energy Security Assessment Phase to ensure the project team has access to relevant information from stakeholders before transitioning to SESP development.

Hagerty has found that regional planning processes involving varied and overlapping stakeholders requires thoughtful coordination. To ensure stakeholders understand the scope of the SESP update, their role in the process, and the intended outcomes, the Hagerty project team will also develop a **SESP Development Roadmap**. The SESP Development Roadmap will be a two-page document that outlines the purpose of the SESP update, OEE's project approach, and a roadmap for stakeholder engagement. The SESP Development Roadmap will be shared with the Stakeholder List during this phase so that stakeholders understand why they will be receiving requests for input and how their input will be used in the SESP update.

The Hagerty team will draft an introductory email to stakeholders identified in the Stakeholder List introducing them to the planning effort and sharing the SESP Development Roadmap. The introductory email will also invite all stakeholders to a **Virtual Stakeholder Kickoff Meeting** to provide a live overview of the project, emphasize its importance to Ohio, and respond to stakeholder questions. This meeting will also present an opportunity to reassure stakeholders that their time and input will be used thoughtfully throughout the project and any sensitive information will be handled appropriately.



Deliverables:

Stakeholder Engagement Strategy, Stakeholder List, State Energy Security Plan Development Roadmap, Virtual Stakeholder Kickoff Meeting

Phase Timeline: 2 weeks

Deadline: March 3, 2023

Phase III: State Energy Equity Research

The Hagerty team will research the impacts of energy equity in the state to ensure the SESP serves all communities in Ohio, particularly those that have historically held more of the energy burden. From Hagerty's previous energy equity research experience, we understand that disadvantaged communities (DACs) face an inequity of energy infrastructure, a lack of access to energy innovation, higher energy costs, and adverse health impacts. Identifying where those communities are will ensure they are accounted for in the updated SESP and support OEE in pursuing future funding opportunities to reduce the energy burden in those communities. Additionally, including representatives from DACs in the SESP planning process will ensure that these communities are not excluded from energy security benefits that the planning process may bring.

The Hagerty project team will leverage DOE's Energy Justice Mapping Tool to identify DACs in Ohio and develop a **State Energy Equity Memo**. The Memo will include the following components:

- » **Summary of DACs:** The memo will summarize all DACs in Ohio identified in the Energy Justice Mapping Tool and what DOE DAC indicators have the largest impact in the state. This information will inform stakeholder engagement throughout the planning process as well as the Hazards, Threats, and Vulnerabilities Inventory that will be developed in Phase V.
- » **Proposal for Future Energy Equity Work:** The memo will identify future projects that could reduce energy inequity in the most vulnerable communities using federal funding available through the Justice40 initiative. The proposal will include a change management plan that outlines the steps needed to move from the current state to a future state with fewer DACs in Ohio and increased energy equity in all communities in the state.

The Stakeholder List will be reviewed to ensure there is adequate representation from government and industry partners that support DACs, and an **Updated Stakeholder List** will be developed if necessary to ensure this critical community is integrated into the planning process. Including DACs in the planning process and incorporating their feedback into the updated SESP will ensure those communities are included in all benefits stemming from effective energy security planning.



Deliverables:

State Energy Equity Memo, Updated Stakeholder List

Phase Timeline: 3 weeks

Deadline: March 10, 2023

Phase IV: Energy Source and Provider Inventory

Hagerty will capture all energy sources as well as regulated and unregulated energy providers in the State through the creation of an **Updated Energy Source and Provider Inventory**.

Developing an accurate Updated Energy Source and Provider Inventory will ensure that updates to the SESP – and the associated risks and vulnerabilities reflected in the SESP – appropriately inform mitigation efforts and response plans. The Hagerty project team will review the existing inventory of all energy sources and regulated and unregulated energy providers in the State, before working with the SESP Project Team, local and national trade associations, and regional organizations including the Public Utilities Commission of Ohio to validate the inventory.

The final Updated Energy Source and Provider Inventory will be delivered to OEE for incorporation into the SESP as an annex, ensuring the Energy Source and Provider Inventory acts as a future resource for OEE and its stakeholders.



Deliverables:

Updated Energy Source and Provider Inventory

Phase Timeline: 3 weeks

Deadline: March 17, 2023

Phase V: State Energy Security Assessment

Ohio's energy security profile is dependent on a wide range of factors, including threats and hazards in the region, existing plans, and Ohio's critical infrastructure. Conducting a thorough assessment of Ohio's energy security will be critical to ensuring the SESP addresses how to mitigate and respond to the most pressing threats to the region. In Phase V, the project team will develop a **Document Review Matrix and Findings Summary, State Energy Profile, Hazards, Threats, and Vulnerabilities Inventory, and Energy Infrastructure and Cross-Sector Interdependence Risk Assessment**. At the conclusion of the phase, the project team will validate key findings with stakeholders at a series of **Energy Security Assessment Validation Workshops**.

During this phase, the project team will coordinate with OEE and regional stakeholders to ensure that the team has access to all relevant plans, assessments, and after-action reports that should inform this effort. Documents may include government developed materials, such as the State of Ohio Hazard Mitigation Plan, and plans and assessments developed by private partners.

The project team will review these documents and develop a Document Review Matrix with key findings as well as a **Document Review Findings Summary**, not to exceed five pages. Using findings from the document review as well as Hagerty's industry and regional experience, the project team will generate a State Energy Profile, develop a Hazards, Threats, and Vulnerabilities Inventory, and conduct a sector-wide risk assessment.

The **State Energy Profile** will provide baseline information on Ohio's energy markets and infrastructure as well as regional and interstate energy markets, which will also support development of subsequent deliverables. This information will be collected from the Public Utilities Commission of Ohio, the federal Energy Information Administration, and other sources, and will incorporate DOE Cybersecurity, Energy Security, and Emergency Response (CESER) Guidance on Developing a State Energy Profile. The State Energy Profile will include an overview of the following:

- » **Production:** The project team will assess in-state energy production, including Ohio's ethanol production, crude oil-refining capacity, and increasing natural gas output.
- » **Transmission:** The project team will review energy transmission within the State as well as interstate transmission, including major pipelines, transmission lines, and rail infrastructure.
- » **Distribution:** The project team will assess energy providers in the State, including natural gas distribution companies, electric utilities, and fuel distributors.
- » **End-Users:** The project team will identify state-specific energy demands, including seasonal variability and demands by sector.

The **Hazards, Threats, and Vulnerabilities Inventory** will plot threats and vulnerabilities in each energy sector against their impact and likelihood in the region. Information in this Inventory will come from DOE state risk profiles, state hazard mitigation plans, state integrated resource plans, utility emergency plans, after-action reports for previous incidents, and discussions with energy system operators and other stakeholders. Hagerty's physical security and cybersecurity subject matter experts will play a critical role in assessing potential vulnerabilities in Ohio's energy infrastructure.

The **Energy Infrastructure and Cross-Sector Interdependencies Risk Assessment** will identify assets most critical to the continuity of energy infrastructure and other critical infrastructure. Understanding which assets are most at risk will give Ohio a sense of the overall risk to energy infrastructure and allow the State to direct mitigation resources towards assets most at risk of causing cascading impacts. The Hagerty team will leverage past experience exploring interdependencies within energy sub-sectors and between the energy sector and other sectors to identify the most critical interdependencies in Ohio.

Hagerty proposes holding three virtual 90-minute validation workshops at the conclusion of the phase with three groups of stakeholders: electricity, oil and natural gas, and government. Each validation workshop will

present findings most relevant to that group of stakeholders, elicit feedback, and introduce the SESP update approach. It will be critical for the project team to receive validation from these three sets of stakeholders separately to ensure the assessment reflects their distinct perspectives. Hagerty proposes inviting Cybersecurity Advisors (CSA) and Protective Security Advisors (PSA) from the Cybersecurity and Infrastructure Security Agency (CISA) to each of the validation workshops. Hagerty has worked with regional CSAs and PSAs previously, and we believe their insight will add value to the assessment process while also ensuring the final assessment aligns to the National Risk Management Center's best practices.



Deliverables:

Document Review Matrix, Document Review Findings Summary, Hazards, Threats, and Vulnerabilities Inventory, State Energy Profile, Energy Infrastructure and Cross-Sector Interdependencies Risk Assessment, Three Energy Security Assessment Validation Workshops

Phase Timeline: 5 weeks

Deadline: April 14, 2023

Phase VI: State Energy Security Plan Development

Leveraging previous project outputs, Hagerty will begin update and development of the SESP, including a **Risk Mitigation Approach**.

The Hagerty team will execute Initial and Final Planning meetings during this process as well as four working group sessions. Hagerty will consider findings and recommendations made by stakeholder input from the planning meetings in Phase V and adjust the SESP accordingly. Hagerty will also review the SESP to ensure it achieves new criteria in Section 40108 of the IIJA.

- » **Initial Planning Meeting:** Prior to the **Initial Planning Meeting (IPM)**, Hagerty will develop an updated **SESP Template**, incorporating both previous plan information and new elements proposed by the Hagerty project team. During the IPM, the project team will review the Template and facilitate discussions to obtain SESP Project Team feedback and additional information regarding scope, purpose, planning assumptions, organizational structure, and the overall intent for the final document.
- » **Working Group Meetings:** Following the IPM, Hagerty will develop the draft outline of the SESP for review by state and regional stakeholders. Hagerty will work with OEE to identify the most effective way to organize stakeholders into working groups, so that these groups may be convened to provide feedback on the draft outline of the SESP, identify outstanding gaps, and validate OEE's approach. Hagerty anticipates organizing stakeholders into two working groups that align with the DOE's proposed SESP content: 1) **Emergency Response Working Group (ERWG)** and 2) **Resilience and Mitigation**

Working Group (RMWG). Hagerty anticipates conducting two iterations of meetings with both the ERWG and RMWG, for a total of four virtual 90-minute meetings.

- » **ERWG:** The ERWG will respond to the DOE's requirement to address multi-state, regional, and tribal coordination, with respect to energy disruption planning and response, and encourage mutual assistance in cyber and physical response plans. Through two iterative sessions, Hagerty will facilitate discussions with government and private partners across Ohio to articulate OEE's energy security priorities, planning and response responsibilities, and describe coordination with Tribal governments, other State entities, and wider public-private coordination. The two iterative ERWG meetings will result in Hagerty developing an **Integrated Preparedness Plan (IPP)** that is up to 10 pages for inclusion in the SESP. This IPP will reflect energy security priorities for stakeholders across the region, existing processes and capabilities, and next steps for continued capability growth.
- » **RMWG:** The two RMWG sessions will support the development of a **Risk Mitigation Approach**. Bringing together owners and operators of energy infrastructure in the State, Hagerty will facilitate two iterative conversations to elicit existing, anticipated, and required mitigation initiatives, including identifying potential opportunities for additional or collaborative mitigation opportunities. OEE should play a convening role in developing the State's Risk Mitigation Approach. As such, the Hagerty project team will work with the SESP Project Team to develop themed discussions that will elicit public-private response processes in the State and describe how public and private partners across the sector will maintain energy reliability, secure their infrastructure, and continue to invest in critical energy infrastructure. The Hagerty project team will use the Energy Infrastructure and Cross-Sector Interdependencies Risk Assessment to support these RMWG meetings. Following meetings with ERWG and RMWG, Hagerty will incorporate all feedback received and follow up with any additional questions with direct calls to the appropriate stakeholders. This will result in a comprehensive draft of the SESP that will be provided to regional stakeholders for review. Hagerty will plan to receive all feedback on the draft SESP no later than May 12, 2023.
- » **Final Planning Meeting:** The **Final Planning Meeting (FPM)** will be used to obtain feedback on the draft SESP and address any outstanding DOE SESP requirements.

Hagerty will revise the SESP as needed, and fact check the document before submitting the final version to the OEE Project Team no later than May 19, 2023. As part of the fact checking process, the Hagerty project team will review the document line-by-line to check the following:

- » All information from external sources is properly cited in the document and accurate;
- » All names of individuals, organizations, and geographic locations are spelled correctly; and,
- » All citations include the most up-to-date information as of the Final Planning Meeting.

When submitting the final SESP, Hagerty will also submit a copy of all sources used to develop the plan for OEE's reference.



Deliverables:

State Energy Security Plan Template, Initial Planning Meeting, Emergency Response Working Group Meetings, Integrated Preparedness Plan, Resilience Mitigation Working Group Meetings, Risk Mitigation Approach, Final Planning Meeting, Final State Energy Security Plan

Phase Timeline: 6 weeks

Deadlines: May 19, 2023

Phase VII: State Emergency Security Plan Stakeholder Meetings

Upon completion of Phase VI, the Hagerty project team will develop two **SESP Presentations**, each lasting up to two hours, to present the updated SESP to key stakeholders. One presentation will be tailored to meet the unique needs of the SESP Project Team and government stakeholders, and the second presentation will be designed for external stakeholders identified by OEE.

The Hagerty project team is experienced in briefing government leaders and industry executives on emergency preparedness, response, and mitigation efforts as demonstrated by Hagerty's experience facilitating the GridEx VI executive tabletop exercise (TTX) with industry and government executives and facilitating discussions with Southern California Edison's executive team and executives from their public and private partner organizations. Our team anticipates developing an interactive session based on past work that may be delivered in-person or virtually at OEE's direction. Recognizing the complexity of the deliverable, the project team anticipates the two-hour session being broken into three portions: State Energy Profile; hazards, risks, and mitigation; and, emergency response, with each portion separated by a question-and-answer session.



Deliverables:

State Energy Security Plan Presentations

Phase Timeline: 2 weeks

Deadline: May 26, 2023

Phase VIII: Project Transition

Following approval, Hagerty will initiate the project transition process. This includes holding a Project Transition Meeting to conclude efforts and confirm with OEE that we have met the Scope of Work (SOW)

appropriately and fully. Ahead of this meeting, the Hagerty team will prepare editable versions of all documentation associated with the plan, delivering a complete catalog of project data sets, files, the final plan, and executive summary in native and PDF formats to be placed on relevant State websites and for future planning. Upon completion of all deliverables, OEE and the State will retain ownership of all created products and documents developed by the contractor that were necessary to update the SESP.

This step will mark the completion of all related contract deliverables and the end of the project, provided the State does not engage Hagerty on additional scope tasks not captured in the final PMP.

Hagerty will provide OEE with a high-level **Next Steps Memo** to provide recommendations for future work that could be undertaken to enhance statewide preparedness and response planning, including how to fulfill goals in the IPP.



Deliverables:

Project Transition Meeting, Next Steps Memo, Digital transmission of project files

Phase Timeline: 1 week

Deadline: May 31, 2023

Project Timeline

Project Phase	Deliverables	Date Range
Contract Award		February 2023
PHASE I – Project Kickoff		February 7 – February 17, 2023
	Project Management Plan, Virtual Project Kickoff Meeting	2 weeks
PHASE II – Stakeholder Outreach		February 17 – March 3, 2023
	Stakeholder Engagement Strategy, Stakeholder List, State Energy Security Plan Development Roadmap, Virtual Stakeholder Kickoff Meeting	2 weeks
PHASE III – State Energy Equity Research		February 17 – March 10, 2023
	State Energy Equity Memo, Updated Stakeholder List	3 weeks
PHASE IV – Energy Source and Provider Inventory		February 25 – March 17, 2023
	Updated Energy Source and Provider Inventory	3 weeks
PHASE V – State Energy Security Assessment		March 10 – April 14, 2023
	Document Review Matrix, Document Review Findings Summary	1 week
	Hazards, Threats, and Vulnerabilities Inventory, State Energy Profile, Energy Infrastructure and Cross-Sector Interdependencies Risk Assessment	3 weeks
	Three Energy Security Assessment Validation Workshops	1 week
PHASE VI – State Energy Security Plan Development		April 8 – May 19, 2023
	State Energy Security Plan Template, Initial Planning Meeting	1 week

Project Phase	Deliverables	Date Range
	Emergency Response Working Group Meetings, Integrated Preparedness Plan, Resilience Mitigation Working Group Meetings, Risk Mitigation Approach, Draft State Energy Security Plan	3 weeks
	Final Planning Meeting, Final State Energy Security Plan	2 weeks
PHASE VII – State Energy Security Plan Stakeholder Meetings		May 13 – May 26, 2023
	State Energy Security Plan Presentations	2 weeks
PHASE VIII – Project Transition		May 24 – May 31, 2023
	Project Transition Meeting, Next Steps Memo, Digital transmission of project files	1 week

Project Budget

Hagerty presents the following as an overview of Hagerty's proposed budget associated with the services sought by the State. This includes alignment of our proposed personnel and hourly rates to the tasks outlined by the State in the RFP, as well as assumed other direct costs. The following table shows the proposed total cost of each project phase and the cost of each deliverable.

Project Phase	Deliverables	Cost
PHASE I – Project Kickoff		\$7,940
	Project Management Plan, Virtual Project Kickoff Meeting	\$7,940
PHASE II – Stakeholder Outreach		\$14,255
	Stakeholder Engagement Strategy, Stakeholder List, State Energy Security Plan Development Roadmap, Virtual Stakeholder Kickoff Meeting	\$14,255
PHASE III – State Energy Equity Research		\$13,655
	State Energy Equity Memo, Updated Stakeholder List	\$13,655
PHASE IV – Energy Source and Provider Inventory		\$5,129
	Updated Energy Source and Provider Inventory	\$5,129
PHASE V – State Energy Security Assessment		\$49,855
	Document Review Matrix, Document Review Findings Summary	\$16,338
	Hazards, Threats, and Vulnerabilities Inventory, State Energy Profile, Energy Infrastructure and Cross-Sector Interdependencies Risk Assessment	\$20,549
	Three Energy Security Assessment Validation Workshops	\$12,968
PHASE VI – State Energy Security Plan Development		\$53,502
	State Energy Security Plan Template, Initial Planning Meeting	\$12,762

Project Phase	Deliverables	Cost
	Emergency Response Working Group Meetings, Integrated Preparedness Plan, Resilience Mitigation Working Group Meetings, Risk Mitigation Approach, Draft State Energy Security Plan	\$32,361
	Final Planning Meeting, Final State Energy Security Plan	\$8,379
PHASE VII – State Energy Security Plan Stakeholder Meetings		\$11,466
	State Energy Security Plan Presentations	\$11,466
PHASE VIII – Project Transition		\$4,290
	Project Transition Meeting, Next Steps Memo, Digital transmission of project files	\$4,290
Total Contract Award		\$160,092

Past Performance and References

We know there is no better evidence of our capability to support OEE and the State than our past performance. Hagerty offers the following projects as examples of work that could best serve OEE in updating Ohio's SESP. Hagerty will be pleased to provide additional past performance upon request.

North American Electric Reliability Corporation GridEx VI

Client Name	North American Electric Reliability Corporation
Project Overview	Services include exercise development and execution, after-action report for each exercise, and Lessons Learned Report for submission to Congress
Project Timeframe	September 2020 to April 2022
Project Budget	\$560,000

NERC's E-ISAC awarded a contract to Hagerty to develop GridEx VI. The GridEx series is a bi-annual grid security and emergency response exercise for E-ISAC members, government entities, and other relevant partners across North America.

GridEx VI comprises two components, Distributed Play and the Executive Tabletop, with Hagerty supporting the planning and delivery of both elements. Distributed Play, held November 16 to 17, 2021, involved almost 300 electric utilities and associated entities from across North America, while the Executive Tabletop, held November 18, 2021, convened executives from industry and government in both the U.S. and Canada. As such, the project required engagement with executive and operational partners across North America.

The Distributed Play portion resulted in the formation of subject matter expert planning groups, three planning meetings, nine planner training webinars, exercise materials and supporting documentation, two days of exercise play, and an after-action town hall series. Throughout the planning process, Hagerty coordinated with hundreds of partners on behalf of the E-ISAC through the shared inbox, developed and presented training content for more than 700 exercise planners, and The Executive Tabletop resulted in a six-hour executive exercise and a three-hour follow-on event, during which executives were encouraged to sponsor the recommendations identified during the exercise. The project team produced an after-action report for each exercise, and a public-facing Lessons Learned Report for submission to Congress.

George Washington University Energy Equity Grant Consultation

Client Name	The George Washington University
Project Overview	Services include local energy policy analysis, research on energy costs and related community impacts, design and facilitation of community-focused forums, and analysis of potential sites for micro-grids in socially vulnerable communities
Project Timeframe	March 2021 to September 2021
Project Budget	\$12,593

In February 2020, Hagerty was engaged by The George Washington University (GWU) to lead elements of a National Science Foundation-sponsored research project on energy equity in Washington, D.C. The goal of the project was to develop an energy-focused intervention that would better define “energy equity” by leveraging policy, technology, and innovation to help reverse long-standing social vulnerabilities in two key Washington D.C. communities.

Hagerty helped establish a cross-sector Advisory Council for the project, which included research scientists, GWU faculty, engineers, non-profit organizations, energy policy advocates, city energy officials and community-based organizations. Hagerty provided local energy policy analysis and research on energy costs and related community impacts to help better define the energy burden of residents.

Hagerty also helped design and facilitate three community-focused forums that focused on understanding the impacts of energy inequity as experienced through higher heating and cooling costs, health-related impacts, more vulnerable energy infrastructure, and a lack of access to energy innovations. These forums brought together community leaders and residents from local health councils, public safety groups, social service providers and non-profits to discuss and define the role of energy as a barrier to equity.

When the Council and its community partners identified an approach of developing two micro-grids in socially vulnerable communities, Hagerty performed an analysis of the two potential sites – a historically Black high school and a historic affordable housing complex - to determine the resilience value of providing more resilient energy access and potentially lowering community energy costs. This analysis demonstrated that the neighborhoods selected would benefit from resulting greater resilience of their energy infrastructure.

National Emergency Management Association Tabletop Exercise for Long-Term Power Outage

Client Name	National Emergency Management Association
Project Overview	Services include cyber threat planning and program development, national-level exercise template development, and evaluation guides for stakeholder engagement
Project Timeframe	December 2016 to September 2017
Project Budget	\$111,504

Hagerty supported NEMA in developing research and subject matter expert-informed TTX materials that could be used by state emergency management agencies and partners to test their energy assurance plans, policies, procedures, coordination, and assumptions in response to a long-term power outage generated by a cyberattack on energy infrastructure. The exercise led key decision makers from all sectors of response through a discussion of how their actions would be shaped based on a cyberattack and how their response would be prioritized given the uncertainty surrounding the attack and the impending cascading impacts associated with a power outage, including those associated with interdependencies between the energy sector's subsectors and the other critical infrastructure sectors.

The project began with the drafting of a promising practices report titled, *"Energy Assurance Planning: Current State and Promising Practices."* This report along with findings from a survey sent to state emergency management agencies on current energy assurance planning practices, needs, and next steps served as the foundation for the template materials. Hagerty coordinated with a NEMA-assembled panel of subject matter experts from utility consortiums, state emergency management agencies, and like partners to develop objectives, scenarios, and discussion questions for the TTX materials. Once the draft TTX templates were developed, Hagerty led pilot TTXs with three states: Nebraska, Illinois, and Maryland, to obtain feedback on the materials and the TTX content. Each TTX had a full planning process, including planning meetings, exercise conduct and evaluation, and after-action report development. Following the exercises, Hagerty modified the materials to incorporate lessons learned from the pilot exercises, before submitting them to NEMA to be hosted on the NEMA website. The final TTX included a Situation Manual template, a PPT template for exercise facilitation, a Planning Guide, a Facilitator Guide template, an Evaluator Briefing template, an After-Action Report template, and Exercise Evaluation Guides.

California Governor's Office of Emergency Services Emergency Support Function 18, Cyber Security Annex Development

Client Name	California Governor's Office of Emergency Services
Project Overview	Services include stakeholder engagement, cybersecurity operations development, and planning workshops
Project Timeframe	June 2018 to June 2019
Project Budget	\$136,385.02

Cal OES awarded a contract to Hagerty to develop an Emergency Support Function (ESF) 18 Cybersecurity Annex for the State of California. Hagerty supported Cal OES in the development of an Annex to the State Emergency Plan (SEP) to provide guidance for the operations of ESF 18. This project involved the engagement of a broad group of stakeholders with a role in ESF 18 and cybersecurity operations in the State of California, including stakeholders from State and local governments, regional fusion centers, and the private sector. Hagerty facilitated planning three planning workshops and an Annex Orientation Workshop, as well as engaged stakeholders through surveys and monthly newsletters, to validate planning concepts and ensure socialization of the Annex. Hagerty developed an ESF 18 Annex and Executive

Summary to provide guidance and tools to support the activities, coordination, and communication of ESF 18 stakeholders. The project resulted in the delivery of three planning workshops, an Annex Orientation Workshop, an ESF 18 Annex, and Executive Summary.

Southern California Edison 2022 Exercise Support

Client Name	Southern California Edison
Project Overview	Services include exercise development, identification of risks, and disaster response capabilities across multiple emergency events
Project Timeframe	May 2022 to December 2022
Project Budget	\$683,280

Hagerty supported the development and facilitation of a virtual full-scale exercise (FSE) for SCE, the primary electricity supply company for much of Southern California, involving internal stakeholders from various departments and corporate representatives from Edison International. The exercise was intended to test and improve SCE's response to a 7.8 magnitude earthquake from a fault slip along the southern San Andreas Fault, or any threat resulting in similar operational impacts. The complex earthquake scenario resulted in severe operational disruptions, including millions of outages, hundreds of fires from pipeline breaks, and critical infrastructure damages - and it required significant interdepartmental collaboration throughout the exercise.

The eight-hour FSE consisted of two concurrent exercises, an Emergency Operations Center (EOC) exercise and Crisis Management Council (CMC) exercise. The EOC exercise focused on the readiness of critical operating units within the organization, from information technology (IT) to the Customer Contact Center. The CMC exercise focused on the role corporate plays in disaster response for the organization, including providing overarching guidance and leadership to the organization while navigating disaster response and operational restoration. Hagerty developed exercise materials used in both the EOC and CMC exercises, including exercise plans, communications plans, the controller/evaluator handbook, and exercise evaluation guides.

Hagerty provided a roster of emergency management professionals to help conduct and evaluate the exercise. After the exercise concluded, Hagerty provided a thorough AAR and provided recommendations focused on FEMA Core capabilities to bolster SCE's preparedness to future events, around the topics of damage assessment, communication, collaboration, customer management, public information, and more.

CenterPoint Storm Restoration Manual

Client Name	CenterPoint Energy
Project Overview	Services include development of a services restoration plan, training for stakeholders, and after-action review of business approach
Project Timeframe	August 2015 to April 2016
Project Budget	\$69,680

In late 2015, Hagerty was brought on board to reevaluate and restructure the service restoration process for CenterPoint, beginning with a full rewrite of the company's antiquated Storm Restoration Plan and the creation of an Incident Command System (ICS) response structure within Distribution Power Delivery. The process began with the establishment of a planning team consisting of representatives from each of the critical service restoration roles. The planning team, in collaboration with the Hagerty team, reviewed currently identified and tested internal promising practices, analyzed, and addressed any gaps, and began melding the processes into a single plan. Concurrently, Hagerty worked with the planning team to build out internal Storm Management Teams, using ICS principles, identifying roles and responsibilities, and building out six role-specific job aids to assist the most consequential roles in ensuring a consistent response. Altogether, the revised Storm Restoration Plan details the process to occur from the first notice of possible severe weather, carrying through planning calls and initiating response, to demobilization, and even detailing an after-action review process for continuous process improvements.

Following the plan and job aid development, Hagerty facilitated five trainings and tabletop exercises on the new roles, and the newly revised plan, to over 100 CenterPoint employees. In the morning session, participants were led through an orientation to the plan, including a look at the information embedded in the links in the plan, as well as an introduction to ICS and a discussion of the streamlined processes. Participants were engaged in a hands-on introduction to the new job aids, being led through the new processes from start to finish, with each participant filling in the key tasks occurring at each point during storm restoration, according to the job aids. During the afternoon, participants separated into two separate storm management teams, and practiced the new roles and processes through a severe thunderstorm scenario. The scenario consisted of three modules: Pre-Planning, Initial Response and Assessment, and Restoration. Participants were able to practice their roles from the beginning of their storm response to the end of the process and the successful resumption of normal operations, including discussing transition responsibilities, detailing both the information each would like to receive when coming on duty, and the information each would relay when being relieved of duty. The final step of this engagement was the development of an on-demand training on the new Storm Restoration Plan, to be housed on CenterPoint's internal learning management system, CNPUniversity. Final deliverables for this project included: a revised Storm Restoration Plan, six associated job aids, a Situation Manual, a participant feedback summary/next steps memo, and an on-demand virtual training.

New York City Hurricane Sandy Recovery and Mitigation Support

Agency Name	New York City Emergency Management
Project Overview	Services include program oversight of mitigation projects and grant management
Project Timeframe	January 14, 2013 to September 30, 2018
Project Budget	\$70,000,000

Since 2013, Hagerty has been engaged by NYC in support of their recovery operation from Hurricane Sandy, which tops \$15 billion in recovery funding across multiple federal agencies. Our work includes extensive support for hazard mitigation programs, supporting NYC to maximize funding and build resilience during recovery. Hagerty supports NYC on both 406 mitigation projects and 404 Hazard Mitigation Grant Program (HMGP) through our dedicated Hazard Mitigation Team and the Project Conformance Team. Specific tasks include:

- » Managing the program oversight of mitigation projects as they are implemented, from design through construction;
- » Proactively monitoring scope and scope modifications; and
- » Re-evaluating project cost effectiveness using Benefit-Cost Analysis (BCA) methodologies and justifications that support increased valuation of NYC assets and services.

Specific to BCA, our professionals gather disaster-specific flood data and use this data to re-engineer the BCA's Depth-Damage Function by recalculating the amount of pre- and post-disaster damages, resulting in enhanced project benefits. Hagerty has also proactively identified projects for consideration and possible resubmission to the state and FEMA if additional HMGP funds become available, such as the Lower Manhattan Integrated Flood Protection and the NYC Housing Authority (NYCHA) Comprehensive Flood Management projects, valued at \$120 million and \$238 million, respectively.

For NYC, Hagerty has prepared almost \$580 million in direct support Hazard Mitigation Plans (HMPs) and \$2.5 billion in indirect support to NYC agencies, including \$280 million for campus-wide, systems-based mitigation for the Department of Environmental Protection (DEP). In addition, Hagerty supported 43 HMGP applications for 16 city agencies, valued at \$1.1 billion. Currently, there are 10 projects with Phase I funding valued at \$280 million, one of which is NYC's mitigation plan. Finally, Hagerty successfully negotiated an innovative approach to incorporating sea level rise into BCA, allowing the DEP to take full advantage of benefits from higher levels of protection above NYC Building Code as outlined in the NYC Wastewater Resiliency Plan and the NYC Panel on Climate Change Report.

References

The following profiles provide references for Hagerty's previous experience in energy security planning. Hagerty will happily provide additional references upon request.

NORTH AMERICAN ELECTRIC RELIABILITY CORPORATION GRIDEX VI

Client Name	North American Electric Reliability Corporation
Project Overview	Services include exercise development and execution, after-action report for each exercise, and Lessons Learned Report for submission to Congress
Project Timeframe	September 2020 to April 2022
Project Budget	\$560,000
Point of Contact	Laura Brown <i>Director, Strategy, Policy, and Programs</i> North American Electric Reliability Corporation, Electricity Information Sharing Analysis Center
Phone	609-951-5232
Email	Laura.Brown@eisac.com

GEORGE WASHINGTON UNIVERSITY ENERGY EQUITY GRANT CONSULTATION

Client Name	The George Washington University
Project Overview	Services include local energy policy analysis, research on energy costs and related community impacts, design and facilitation of community-focused forums, and analysis of potential sites for micro-grids in socially vulnerable communities
Project Timeframe	March 2021 to September 2021
Project Budget	\$12,593
Point of Contact	Robert W. Orttung <i>Director of Research, Sustainable GW</i> George Washington University
Phone	703-989-4786
Email	rorttung@gwu.edu

Standard Affirmation and Disclosure Form

Please find Hagerty's completed Standard Affirmation and Disclosure Form attached to this section.

STANDARD AFFIRMATION AND DISCLOSURE FORM

EXECUTIVE ORDER 2019-12D cpf "4244/24F

Governing the Expenditure of Public Funds on Offshore Services ("Ucvg"qh"Qj kq)u" Tgur qpug"vq"Twuukc)u"
Wplwuv"Y ct"qp"y g'Eqwpvt{ "qh"Whtckpg

All of the following provisions must be included in all invitations to bid, requests for proposals, state term schedules, multiple award contracts, requests for quotations, informal quotations, and statements of work. This information is to be submitted as part of the response to any of the procurement methods listed.

By the signature affixed hereto, the Contractor affirms, understands and will abide by the requirements of Executive Order 2019-12D" cpf" Gzgewkxg" Qtf gt" 4244/24F. If awarded a contract, both the Contractor and any of its subcontractors shall perform no services requested under this Contract outside of the United States"qt"o cng"any purchase from or investment in any Russian institution or company.

The Contractor shall provide all the name(s) and location(s) where services under this Contract will be performed in the spaces provided below or by attachment. Failure to provide this information may subject the Contractor to sanctions. If the Contractor will not be using subcontractors, indicate "Not Applicable" in the appropriate spaces.

1." Principal location of business of Contractor:

1618 Orrington Avenue, Suite 201
(Address)

Evanston, IL, 60201
(City, State, Zip)

Name/Principal location of business of subcontractor(s):

N/A
(Name)

(Address, City, State, Zip)

N/A
(Name)

(Address, City, State, Zip)

2. Location where services will be performed by Contractor:

1618 Orrington Avenue, Suite 201
(Address)

Evanston, IL, 60201
(City, State, Zip)

Name/Location where services will be performed by subcontractor(s):

N/A
(Name)

(Address, City, State, Zip)

N/A
(Name)

(Address, City, State, Zip)

3. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor:

N/A: Hagerty leverages Microsoft data storage solutions.

(Address)

(Address, City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained or backed-up by subcontractor(s):

N/A

(Name)

(Address, City, State, Zip)

N/A

(Name)

(Address, City, State, Zip)

N/A

(Name)

(Address, City, State, Zip)

N/A

(Name)

(Address, City, State, Zip)

N/A

(Name)

(Address, City, State, Zip)

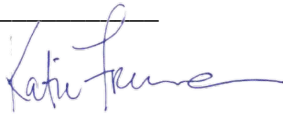
Contractor also affirms, understands and agrees that Contractor and its subcontractors are under a duty to disclose to the State any change or shift in location of services performed by Contractor or its subcontractors before, during and after execution of any Contract with the State. Contractor agrees it shall so notify the State immediately of any such change or shift in location of its services. The State has the right to immediately terminate the contract, unless a duly signed waiver from the State has been attained by the Contractor to perform the services outside the United States.

On behalf of the Contractor, I acknowledge that I am duly authorized to execute this Affirmation and Disclosure form and have read and understand that this form is a part of any Contract that Contractor may enter into with the State and is incorporated therein.

By: Hagerty Consulting, Inc.

Contractor

Print Name: Katie Freeman



Title: Director of Operations

Date: January 6th, 2023

Standard Terms and Conditions

Please find Hagerty's signed Standard Terms and Conditions form attached to this section.

STANDARD TERMS AND CONDITIONS
EXECUTIVE ORDER 2019-12D and 2022-02D
Governing the Expenditure of Public Funds on Offshore
Services & State of Ohio's Response to Russia's Unjust War on
the County of Ukraine

The Contractor affirms to have read and understands Executive Order 2019-12D and 2022-02D and shall abide by those requirements in the performance of this Contract. Notwithstanding any other terms of this Contract, the State reserves the right to recover any funds paid for services the Contractor performs outside of the United States for which it did not receive a waiver. The State does not waive any other rights and remedies provided the State in this Contract.

A handwritten signature in blue ink, appearing to read "Katie Freeman", is positioned above the printed name.

Contractor: Hagerty Consulting, Inc.

Print Name: Katie Freeman

Title: Director of Operations

Date: January 6th, 2023