



City of Merced Housing Division
Community Development Block Grant
Home Investment Partnership Program

Response to:

**Request for Proposals
Consolidated Plan
First Year Action Plan
Analysis of Impediments to Fair Housing**

TECHNICAL PROPOSAL

Submitted Thursday August 16, 2019 4:00pm

by

TDA Consulting, Inc. ("TDA")



Table of Contents

TAB 1. COVER LETTER/EXECUTIVE SUMMARY	3
TAB 2. EXPERIENCE AND QUALIFICATIONS OF FIRM	5
<i>Consolidated Plans:</i>	6
<i>Analysis of Impediments:</i>	8
TAB 3. TAB 3 – EXPERIENCE & QUALIFICATIONS OF PERSONNEL	11
<i>Project Team:</i>	11
TAB 4. WORK PLAN AND SCHEDULE	14
<i>Consolidated Plan:</i>	14
<i>Analysis or Impediments:</i>	18
<i>Schedule:</i>	26
TAB 5. EXCEPTIONS.....	26
TAB 6. ADDITIONAL INFORMATION	27
TAB 7. REQUIRED FORMS.....	29
TAB 8. ADDITIONAL CONSIDERATION – HOUSING CONDITION WINDSHIELD SURVEY	29
RESUMES.....	30



TAB I. Cover Letter/Executive Summary

August 15, 2019

City of Merced
678 W. 18th Street
Merced, CA 95340

Attn: Mark Hamilton, Housing Program Supervisor

Dear Mr. Hamilton:

TDA has developed Consolidated Plans for local communities including: Birmingham, AL; Lake County, IL; Lexington County, KY; Burlington, NC; Greenville, NC; Greensboro, NC; High Point, Richland County, NC; Wilmington, NC; NC; Luzerne County, PA; Charleston, SC; Charleston County, SC; Horry County, SC; Rock Hill, SC; Nashville-Davidson, TN; and San Antonio, TX; Additionally, TDA is currently under contract to produce a Consolidated Plan for the City of Lubbock, TX. In addition to those Consolidated Plans, TDA has completed fair housing studies for state and local jurisdictions, particularly Analyses of Impediments to Fair Housing. Most recently, TDA has assisted the State of South Carolina, State of Michigan, Commonwealth of Pennsylvania, Contra Costa County, CA, and Charleston, SC.

TDA Consulting, Inc., a small, minority, woman-owned business, founded in 1998, is a national consulting firm committed to promoting excellence and professionalism throughout the housing and community development field. TDA focuses on supporting our clients with their affordable housing and community development activities through competitively awarded contracts, as well as, providing support to the U.S. Department of Housing and Urban Development (HUD) through grant-funded projects. For the past 19 years, TDA has been providing training and technical assistance on a variety of housing and community development programs, including the full

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



range of HUD Community Planning & Development (CPD) programs and the federal Low Income Housing Tax Credit (LIHTC) program.

Ms. Madeline Cook will serve as Executive-In-Charge for this project. If you have any questions, you may contact her at 617.304.4663 or mcook@tdainc.org. We look forward to working with the City of Merced, CA. TDA Consulting Inc. will be responsible for all deliverables.

The signer of the RFP declares that the RFP is in all respects fair and in good faith without collusion or fraud, and that the signer of the RFP has the authority to bind the principal proposer – TD Consulting Inc.

Sincerely,

A handwritten signature in black ink, appearing to read "Dionne L Roberts", written over a horizontal line.

Dionne L Roberts
President and CEO



TAB 2. Experience and Qualifications of Firm

Since 1998, TDA has received nearly \$60 million from the U.S. Department of Housing and Urban Development (HUD) technical assistance funds, and over \$5 million in awards from other government and private organizations to provide technical assistance, training, and organizational development. Currently, we manage consulting contracts in 39 states across the country. We have managed hundreds of complex projects and established a reputation for completing activities within the defined budget and timeframes. At any given time, up to 70 individual projects may be taking place simultaneously, including a combination of training and direct consulting interventions. We keep all these projects running on schedule and within budget. And we accomplish this without sacrificing the quality of our services, earning us the confidence of our clients.

Additionally, TDA has effectively assisted jurisdictions with fair housing studies for over 20 years. The TDA team provides cutting edge data analytics and mapping for its clients. We provide a seamless integration of in-depth understanding of fair housing laws and best practices for addressing fair housing concerns, meaningful community engagement, and data analysis and visual representation of that data. Our nationwide perspective is balanced with an understanding that all actions to address fair housing concerns must be tailored to the local environment.

- a. Name of Firm – TDA Consulting Inc.
- b. Mailing Address:

TDA Consulting Inc.
131 Atkinson Street, Ste. B
Laurinburg, NC 28352
- c. Physical Address: Same
- d. Contact Person – Madeline Cook
- e. Phone Number - 910.277.1275
- f. Fax Number - 910.277.2816
- g. Cell Phone - 617.304.4663

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910.277.1275 • 910.277.2816 Fax • www.tdainc.org



- h. Email address – mcook@tdainc.org
- i. Business Structure – Corporation
- j. TDA Consulting Inc. will be responsible for all deliverables
- k. Number of Years – Since 1998, twenty-one (21) years
- l. Proof of Liability Insurance – See Attached
- m. Total Staff – Management 4 Clerical 5 Field 9
- n. Litigation/Major Disputes/Contract Defaults/Liens Last 10 years – None
- o. SWMBE - San Antonio, TX Regional Certification Agency
- p. NC HUB

TDA has developed Consolidated Plans for local communities including: Birmingham, AL; Lake County, IL; Lexington County, KY; Burlington, NC; Greenville, NC; Greensboro, NC; High Point, Richland County, NC; Wilmington, NC; NC; Luzerne County, PA; Charleston, SC; Charleston County, SC; Horry County, SC; Rock Hill, SC; Nashville-Davidson, TN; and San Antonio, TX; Additionally, TDA is currently under contract to produce a Consolidated Plan for the City of Lubbock, TX. In addition to those Consolidated Plans, TDA has completed fair housing studies for state and local jurisdictions, particularly Analyses of Impediments to Fair Housing. Most recently, TDA has assisted the State of South Carolina, State of Michigan, Commonwealth of Pennsylvania, Contra Costa County, CA, and Charleston, SC.

Consolidated Plans:

- **Client/Project: Charleston, SC Consolidated Plan & Action Plan**

Description of services: In 2014-2015, TDA prepared a Consolidated Plan for the City of Charleston using HUD's e-Con Planning Suite. The Consolidated Plan is a comprehensive document that describes the City's housing market conditions identified needs for affordable housing and community development and provided strategies to address the City's needs over the next five years.

Point of contact: Geona Johnson, Director, Community Development, 145 King Street Suite 400, Charleston, SC 29401, phone: (843) 724-3766, email: <mailto:JOHNSONG@charleston-sc.gov>

- **Client/Project: Lake County, IL Consolidated Plan 2015 -2019 & Action Plan**

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



Description of services: In 2014-2015, TDA prepared a Consolidated Plan for Lake County, IL (outside Chicago, IL) using HUD's e-Con Planning Suite. The Consolidated Plan is a comprehensive document that describes the urban county's housing market conditions identified needs for affordable housing and community development and provided new strategies to address the county's needs over the next five years. Marking a major change in direction, this plan better aligns the use of the County's grant funding with the community's needs.

Point of contact: Jodi Gingiss, Community Development Administrator, 500 W. Winchester Road, Unit 101, Libertyville, IL 60048, phone: (847) 377-2139, email: JGingiss@lakecountyil.gov

- **Client/Project:** Knox County, TN, Consolidated Plan and Annual Action Plan

Description of services: In 2014-2015, TDA prepared a Consolidated Plan for Knox County, Tennessee using HUD's e-Con Planning Suite. The Consolidated Plan developed for Knox County, Tennessee was a comprehensive document that described the County's housing market conditions identified needs for affordable housing and community development and provided strategies to address the County's needs over the next five years. The resulting Consolidated Plan provided a unified vision for community development and housing actions with the primary goals of providing affordable housing, public facilities, revitalized target neighborhoods, preserve historic resources, support for homeless and special needs populations and building and maintaining existing infrastructure.

Point of contact: Rebecca Gibson, Director, Knox County Community Development, Columbus Consolidated Government County Building, Suite 630, 400 Main Street, Knoxville, TN 37902, Phone: (865) 215-3980, email: Rebecca.gibson@knoxcounty.org

Sample Lake County, IL Consolidated Plan¹

<https://tdainc4all->

[my.sharepoint.com/:b:/g/personal/halvarez_tdainc_org/EfQJTa0RNO1Nqk_LttNkof4BAC6jQpSeDE6rWylyTf0I9Q?e=i3hGMv](https://tdainc4all-my.sharepoint.com/:b:/g/personal/halvarez_tdainc_org/EfQJTa0RNO1Nqk_LttNkof4BAC6jQpSeDE6rWylyTf0I9Q?e=i3hGMv)

¹ If link is disabled, please paste link into your browser window.



Analysis of Impediments:

- **Client/Project:** Contra Costa County Regional Analysis of Impediments

Description of Services: February 2016 through April 2017 TDA completed a regional Analysis of Impediments for Contra Costa County and 21 jurisdictions, including the City of Richmond. The Analysis of Impediments of Fair Housing Choice reviewed ordinances, laws, market conditions, demographic and housing market data, research on fair housing concerns in the region, and input from its community members. It assesses how these factors may impede fair housing opportunities and offers recommendations for overcoming those impediments. TDA had worked with the City of Richmond on the development of its Consolidated Plan and was under contract to develop an Analysis of Impediments for the City of Richmond. However, the City and Contra Costa County recognized the value in partnering to conduct a regional study, and so TDA expanded the scope of its services. The regional study analyzed the County as well as individual jurisdictions within the County to provide both a broad perspective on how issues are similar across the region and how they differ. This will allow the jurisdictions the ability to more effectively combine resources, where appropriate, and target resources, where necessary, to address obstacles to fair housing and fair housing choice.

Point of Contact: Gabriel Lemus, Community Development Manager, Contra Costa County, 30 Muir Rd, Martinez, CA 94553, phone: (925) 674-7882, email: gabriel.lemus@dcd.cccounty.us

- **Client/Project:** Charleston, SC Regional Analysis of Impediments to Fair Housing Choice

Description of Services: October 2015 through April 2016, TDA prepared a regional Analysis of Impediments to Fair Housing Choice (AI) for the City of Charleston, Charleston County and the City of North Charleston. The team worked closely with jurisdictions to update the AI. The update of the AI incorporated new data sets, a review of HMDA data, and updates to previous AI findings.

Point of Contact: Genoa Johnson, Housing and Community Development Director, City of Charleston, 75 Calhoun Street Third Floor, Charleston, SC 29401, phone: (843) 724-3766, email: JOHNSONG@charleston-sc.gov

- **Client/Project:** State of South Carolina Statewide Analysis of Impediments and Assessment of Fair Housing

Description of Services: October 2016 through present, TDA was recently selected to prepare the State of South Carolina's statewide Analysis of Impediments to Fair Housing Choice (AI) and then "upgrade" it as an Assessment of Fair Housing upon release of HUD's final State AFH Tool,



if needed. The study will examine fair housing in all geographic regions of the state. It will provide a full assessment of demographics, community and stakeholder perspectives, fair housing complaint data, and recommendations that are uniquely tailored to the fair housing concerns and resources in each region as well as statewide. Because the State first requires an AI, but later wants the report to be submitted as an AFH, TDA will incorporate into the analysis the broader review of fair housing concerns stipulated by the AHHF. The team will draw upon team members' recent experience completing local AFHs in the Carolinas and TDA experience in completing statewide AIs for other states.

Point of Contact: Leanne Johnson, Application Manager, South Carolina Housing Finance Agency, 300-C Outlet Pointe Blvd., Columbia, SC 29210, phone: (803) 896-9248, email: Leanne.johnson@schousing.com

- **Client/Project:** State of Michigan, Analysis of Impediments to Fair Housing

Description of Services: October 2015 through November 2016, TDA recently finalized a comprehensive, statewide Analysis of Impediments to Fair Housing Choice for the State of Michigan and its subrecipient jurisdictions with final publication expected in October 2016. The study reviewed ordinances, laws, market conditions, demographic and housing market data, research on fair housing concerns, and extensive community input. It assessed how various factors may impede fair housing opportunities and offers recommendations for overcoming those impediments statewide while providing analysis of unique regional differences. The analysis was based on a proven methodology developed by TDA over many years of supporting local communities in analyzing their impediments to fair housing choice. As with other recent AI clients, TDA has taken steps in its development of the AI to prepare the State for a future transition to the Assessment of Fair Housing process ensuring ongoing compliance with the requirements of 24 CFR 5.154 as these standards evolve.

Point of Contact: Scott Grammer, Michigan State Housing and Development Authority, 735 E. Michigan Avenue, Lansing, MI 48912, phone: (517) 373-4765, email: grammers@michigan.gov

- **Client/Project:** Commonwealth of Pennsylvania, Analysis of Impediments to Fair Housing Choice and Fair Housing Plan

Description of Services: In 2014-2015, TDA prepared a comprehensive, statewide Analysis of Impediments to Fair Housing Choice for the Commonwealth and its subrecipient jurisdictions. The expansive study, entitled Assessment of Fair Housing for the Commonwealth of Pennsylvania, reviews ordinances, laws, market conditions, demographic and housing market data, research on fair housing concerns, and input from its community members. It assesses how



these factors may impede fair housing opportunities and offers recommendations for overcoming those impediments both statewide and in regions of the state including 50 local non-entitlement jurisdictions.

Point of Contact: Joseph Meade, Department of Community & Economic Development, 400 North Street, 4th Floor, Harrisburg, PA 17120, phone: (717) 720-7407, email: josomeade@pa.gov

Sample Clayton County Georgia AFH¹

https://tdainc4all-my.sharepoint.com/personal/halvarez_tdainc_org/_layouts/15/guestaccess.aspx?docid=1e0205b3f806248ba9b6d4886be5595f1&authkey=ARs-ZFmLw4aQD92JSLpg9-I

¹ If link is disabled, please paste link into your browser window.



TAB 3. Tab 3 – Experience & Qualifications of Personnel

Project Team:

For this project, we have assembled a highly experienced team of recognized experts in the field. The TDA team has extensive experience evaluating both HUD data and maps while supplementing with other sources as necessary. Our quantitative research is tempered by the qualitative results of a robust community engagement process and a deep understanding of the practical realities facing local recipients of HUD funding. Together, this allows TDA to effectively assess a community's efforts in resolving issues identified in the AI and recommend realistic and achievable Plan strategies.

- Madeline Fraser Cook, TDA Project Manager – Executive in Charge (EIC), Team Lead, Assistant Author/Reviewer, and Community Engagement
- Jennifer Alpha, TDA Project Manager & Corporate Counsel, Primary Author/ Reviewer
- Pamela Paige, TDA Associate – Assist with Community Engagement, Data Collection and Analysis
- Erich Chatham, TDA Consultant – Data Analysis/Mapping
- Administrative Support (TBD)

TDA team bios give additional insight into the breadth of experience and expertise of the key staff proposed on this project. All proposed team members each have over a decade experience in this field.

- **Madeline Fraser Cook**, Project Manager, will serve as the Executive in Charge/Team Lead and will be responsible for the entire engagement and will assist with plan authorship and coordinate community outreach (contribute to the planned public surveys and participate in other aspects of the community engagement process such as stakeholder interviews). Ms. Cook will also provide guidance and expertise related particularly to the findings and recommendations. She has 18 years of experience working with diverse communities and local governments. As a native Spanish speaker, she has worked with Hispanic communities across the country in a variety of capacities, from translation services to community organizing. Being from a Hispanic background, having married into a Vietnamese family as well as having lived abroad extensively, Fraser Cook has a firm grasp of how important cultural aspects are to community projects and how to be respectful of them. She has experience meeting the specific community engagement requirements of the AFH process

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



and has successfully conveyed the importance of community input in accurate analysis of fair housing needs. She brings the ability to combine the qualitative nature of the AFH community engagement research with the strictly quantitative data analysis required of the AFH submission. As a Project Manager at TDA Consulting, she provides technical assistance to HUD Community Planning and Development grantees and leads various research and training projects. Fraser Cook has extensive experience collecting and analyzing quantitative and qualitative data in the housing and community development field. She has previously worked on the local and housing studies and plans. Fraser Cook specializes in the intersection of housing and community development and sustainability. Her areas of expertise include green affordable housing, environmentally sustainable neighborhood planning, and resilience. She is particularly interested in bringing these concepts more fully into projects in communities of color. Fraser Cook graduated with degrees in Political Science and Economics from Swarthmore College, and holds a Masters of City Planning with a focus on Housing and Community Economic Development from the Department of Urban Studies and Planning at MIT where she was a HUD Fellow. She is a LEED Accredited Professional.

- **Jennifer Alpha**, Project Manager and its Corporate Counsel. Alpha will act as the primary Plan author and reviewer, roles similar to what she is playing in Contra Costa County and has played in several other jurisdictions. Alpha has over 15 years of diverse experiences managing projects related to a range of affordable housing and community development initiatives. Formerly, as a partner at a law firm that represented public and nonprofit organizations, Alpha assisted clients with legal representation and transactional management of housing and community development programs, which included financing sources such as LIHTC, Public Housing Capital and Operating Funds, Section 8, HOME, CDBG, NSP, and Federal Home Loan Bank Affordable Housing Programs. She manages engagements for local governments, by providing regulatory and procedural guidance, data analysis, and assistance with working out troubled projects. Alpha also assists clients in the development of policies and procedures manuals, guidebooks, and needs assessment reports. With a background in both law and policy, she works with clients to meet program requirements while presenting meaningful recommendations based on sound analysis of each client's unique circumstances. Prior to TDA, Alpha also worked for the Government Accountability Office (GAO) where she managed the evaluation of federal housing programs with a special emphasis on LIHTC, TCAP, the Section 1602 program, and HUD-assisted housing programs. Based on these evaluations, she drafted reports to Congress as part of a team to inform Congress on how programs could be improved. This experience has sharpened Alpha's understanding of what federal regulators expect from grantees, what areas are prime targets for monitoring, and how grantees can more effectively comply with federal requirements. Alpha is a HOME Certified Specialist-Regulations and has provided trainings across the country on a range of HOME topics. She



holds a J.D., University of Pittsburgh School of Law, and an MPA, Public Management & Policy, University of Pittsburgh.

- **Pamela Paige**, Senior Associate, has 15 years of experience as program manager within grassroots community development organizations working with residents and other stakeholders to increase community participation and self-advocacy to improve quality of life, self-sufficiency and economic outcomes. Paige has managed comprehensive community outreach and public engagement initiatives including multi-tiered outreach and public meetings. She has a history of developing a strong rapport with all levels of internal and external stakeholders. She has provided support for the AFH public participation and community engagement process including participating in stakeholder interviews and community meetings; collecting and documenting data; and populating the WASS system with all required documents developed during the AFH process. Paige has also managed private sector real estate development and property management/rental firms. She earned a Bachelor of Science in Business Management, concentrating in Accounting and Human Resources, from the University of Baltimore in Baltimore, Maryland.
- **Erich Chatham**, Associate, founding partner of Civitas, Inc., a community and economic development consulting firm based in Charleston, SC that regularly partners with TDA. Chatham will be primarily responsible for developing the demographic and housing profile for the AFH, a role similar to what he is performing on the Contra Costa County AI and other engagements. Chatham has been a key part of TDA's team across the country on regional and statewide AIs and more recently on AFHs. He has nearly 10 years' experience working on economic and community development projects with local governments, for-profits and nonprofits across South Carolina, North Carolina, Louisiana, Florida, Georgia, California and Texas. Chatham works with local governments on urban revitalization initiatives utilizing CDBG program funding. He also recently worked with several OneCPD grantees to overhaul HOME and CDBG policies and procedures manuals to conform to updated HUD regulations. Chatham also has extensive experience working with the new eCon Planning suite and serves as an IDIS trainer. Chatham holds an MPA from the College of Charleston and a BA in history from Oglethorpe University. *Full resumes are attached.*

All personnel and equipment are available to perform the work immediately



TAB 4. Work Plan and Schedule

Consolidated Plan:

TDA will assist the City in preparing a Consolidated Plan acceptable to HUD based upon the firm's demonstrated experience and capabilities. Our extensive work with HUD, has enabled TDA to develop a consistent approach to assisting cities develop community plans that set realistic goals, are based on sound data, and are HUD-compliant.

Using a mix of qualitative and quantitative methods, we propose to deliver a high-quality Consolidated Plan that will provide new insights for the community profile of the City. TDA team members will coordinate closely with the City to develop a five-year Consolidated Plan through a series of meetings and workgroups. TDA encourages the participation of the Authority's representatives to the greatest extent possible to ensure that the final products meet the City's vision and priorities; and that staff has the information necessary to assess progress and evaluate impacts on the community. Based on recommendations by the TDA team, the City will make final decisions concerning strategies and actions the City will take to address community goals and needs and the performance measures used to gauge progress.

Descriptions of the major plan components that will be developed and compiled using the e-Con Planning Suite to deliver the City a timely, quality, and compliant Con Plan follow below:

- **Consultation/Coordination:** During the initial meeting, TDA will meet on-site with City to discuss the project, develop detailed schedules and collect necessary information, including, but not limited to, the City's existing Consolidated Plan, fair housing plan and other relevant information from City agencies. City representatives will be asked to identify and provide any other relevant data and information to ensure that all community needs, conditions and resources are considered.
- **Citizen Participation Process:** The consultant team will work with the City to schedule the



required public meetings to gather information and feedback from the City's citizens discuss developing other approaches to soliciting feedback such as stakeholder interviews, focus groups and community surveys. The information obtained will also be used to update the Citizen Participation Plan for 2020 - 2024. TDA will assist the City staff in development and design of Citizen Participation Plan and can suggest additional actions the City may take to attract the most diversity in perspectives to ensure its plans are comprehensive and effective.

- **Housing Market Analysis:** In consultation with City, TDA will conduct a comprehensive housing market analysis that addresses housing availability, affordability, adequacy and accessibility.
- **Homeless Needs, Priorities and Strategies:** TDA will assist the City in providing a concise summary of the nature and extent of homelessness within the jurisdictions, (including rural homelessness and chronic homelessness where applicable), addressing separately the need for facilities and services for homeless persons and homeless families with children, both sheltered and unsheltered, and homeless subpopulations. The summary will include the characteristics and needs of low -income individuals and children, (especially extremely low income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered. In addition, the plan will include a description of the nature and extent of homelessness by racial and ethnic group. As part of the homeless need's assessment, the consultant team will identify area facilities and services in place to provide for the homeless population. This will include, at a minimum, the local Continuum of Care, all emergency shelters, any homeless outreach program(s) as well as available transitional and permanent housing options.
- **Housing Needs, Priorities and Strategies:** Additionally, the consultant team will work with the City to identify any additional data and information, including existing housing and/or homeless studies and information on special needs populations, etc., not previously considered. After obtaining this information, the consultants will use it—along with the



information gathered at the initial meeting, census data and other HUD resources—to develop a needs assessment for the City’s review and approval.

- **Public Housing Needs/Strategy:** The consultant team will provide an updated list of needs and strategies of publicly operated or otherwise subsidized housing facilities, to include LIHTC, Tax Exempt Bond Financing, Community Development Corporation (CDC), CHDO, Section 8 Housing Choice Voucher (HCV), and other subsidized housing facilities and programs.
- **Non-Housing Community Development Needs and Strategies:** TDA will identify the City’s priority non-housing community development needs eligible for assistance. This includes public facilities, public improvements, public services and economic development. This analysis will include a look at the homebuilding industry in the City, its current neighborhood development policies, and its economic development initiatives. This will include but be limited to the following; public libraries and museums, parks and community centers, health facilities, historic preservation, continuing education/adult education facilities, and any additional youth, adult or senior programs. This review will incorporate regional planning and economic development initiatives including but not limited to urban development, infrastructure, public safety, public transportation, employment training, and business attraction and retention.

It should be noted that Consortia Plans are submitted in IDIS will vary based on the CPD grants received. Entitlement consortium members will create multiple templates that the user can view the appropriate template based on whether the entity is the lead entity or an entitlement entity.

In consultation with the City and based on the data analysis, inter-agency consultation, and citizen participation process, the consultant will assist in developing a five-year strategic plan that addresses the following legislated components:

- B. affordable housing
- B. homelessness



- B. special needs housing
- B. non-housing community development
- B. barriers to affordable housing
- B. anti-poverty strategy
- B. coordination of the Consolidated Plan with other organizations
- B. public housing initiatives

TDA will also aid the City in developing an Annual Action Plan that supports the objectives and strategies outlined in the previous assessments and analyses. TDA will aid City staff in the selection of eligible activities in the development of the Action Plan. Specific benchmarks/performance measures will be developed so that the City and HUD will be able to assess and evaluate the City's progress in reaching its goals. The one-year Action Plan will be consistent with the requirements outlined in 24 CFR Part 91 as well as with other guidance issued by HUD. City representatives will review and provide comments on the draft of the Annual Action Plan, which TDA will incorporate into the final version. The Plan will be developed using HUD's new IDIS-based e-Con Planning Suite. Key team members are knowledgeable of and have experience developing Con Plans under the system and training grantees on how to use the system. The new Planning Suite provides streamlined data collection and a standardized template that provides grantees with greater certainty that their planning process adheres to HUD's guidelines and vision. TDA will utilize the eConPlan template to import all relevant data tables, narratives, charts, and maps into IDIS. CPD Maps will be used for spatial analysis and mapping, and where needed, ArcGIS will be utilized to create maps needed to supplement CPD Maps.



Analysis or Impediments

Over many years of assisting HUD grantees with fair housing issues, TDA has developed a proven methodology for developing sound recommendations to mitigate and address fair housing issues as shown in a step-by-step approach that is organized under three phases, including a set of related tasks:

PHASE I – ORIENTATION

PHASE II – ASSESSMENT

- Task A: Conduct Research and Data Analysis
- Task B: Review and Assess City Laws and Other Conditions that Affect Fair Housing
- Task C: Conduct Community Outreach and Consultation

PHASE III – FAIR HOUSING PLANNING

- Task A: Develop Preliminary Findings and Recommendations
- Task B: Produce Final Analysis of Impediments and Related Documents

In addition to the required elements, TDA will guide preparation of an action plan that assists the City in implementing goals and priorities set in an AI over a 12-month period. This additional document will inform the Consolidated Plan and Annual Action Plan, including appropriate allocations of resources from HUD funding.

As a result of the services performed by TDA, the City will receive an AI that is fully compliant with HUD's new recent guidance on Affirmatively Furthering Fair Housing (AFFH) and that can form the basis for the City's ongoing fair housing obligations over the next several years.

Process for Completion of Analysis of Impediments

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



Assessing and ending barriers to fair housing in any community rely entirely on information; information that delivers a complete understanding of the extent of contributing factors that can lead to unfairness in housing choice.

TDA's proven methodology for developing sound recommendations to mitigate and address fair housing issues as shown in a step-by-step approach that is organized under three phases:

PHASE I – ORIENTATION

This first phase begins with TDA obtaining applicable documents and project-related files from the City (including Consolidated Plans and Action Plans, past Fair Housing Studies, etc.) TDA arranges and conducts a kick-off meeting, usually onsite, to become acquainted with primary contacts, and to establish a mutual and complete understanding of the project's parameters based on affirmed needs and expectations. This includes exchanging contact information, details about the organization's clientele and customer base, and insight into any particular sensitivities that could impact the engagement. Both TDA and the client establish a firm understanding of the process, schedule and deliverables. As a result, this phase will ensure a solid start to the project.

PHASE II – ASSESSMENT

The second phase follows with factual data gathering and research that provides a demographic profile, a thorough examination of laws and regulations, and an effective process of engagement with the community to determine factors that contribute to barriers to fair housing.

Task A: Conduct Research and Data Analysis

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910.277.1275 • 910.277.2816 Fax • www.tdainc.org



Immediately after the kickoff meeting, TDA will define fair housing issues by collecting and then analyzing statistical data to create a current profile of the housing situation in the region with appropriate coverage of the City service areas.

To develop the profile, TDA reviews existing documents, including the jurisdiction's current Analysis of Impediments to Fair Housing Choice and the local jurisdiction's current Consolidated Plan. Based on findings in these documents, TDA develops updated demographic profiles of regional analysis areas including key regional highlights. The assessment analyzes the study area's population by race and ethnicity, household composition, age, and income; evaluates the area's demographics; takes an inventory of housing demand; reviews supply and market dynamics; and analyzes mortgage lending trends.

TDA develops a baseline housing assessment for the region that includes a detailed understanding of existing conditions and associated trends. Specifically, the research and analysis used in the most recent and relevant HUD data and information, which may or may not have been included in prior studies. In addition, TDA obtains information on fair housing complaints and enforcement actions from HUD's Fair Housing and Equal Opportunity office as well as applicable City and local agencies.

This task also explores housing-related issues on a more in-depth basis by looking at disproportionate housing needs, lending patterns and other factors that cause disparate impacts for minorities.

TDA will share data findings with the City and seek its assistance to ensure that officials actively participate in the identification of impediments to fair housing choice. This consultation is important as those officials will have unique perspectives on what may have caused demographic changes or areas of sensitivity.



Task B: Review and Assess City Laws and Other Conditions that Affect Fair Housing

Once baseline information has been collected and reviewed, TDA will also assess City laws and policies, particularly identifying the framework for local jurisdictions' planning, zoning, building, transportation, and non-discrimination ordinances. Reviewing this framework helps TDA identify and define possible actions or omissions in the public sector (including public housing, community development, transportation, and community services) that may affect the location, availability, and accessibility of housing in the region. The review features an inclusive process to ensure the perspectives of the public sector, affected industry professionals, and members of each protected class are considered during the development of the AI.

TDA also reviews, to the extent this information is available, public sector policies and their possible impact upon equal housing choice and will place special attention on several categories of municipal activity, such as:

- Investment patterns relative to locally controlled HUD resources
- Planning and zoning practices and building codes (accessibility)
- Neighborhood revitalization
- Public and assisted housing
- Property tax policies

In some cases, these public-sector policies and frameworks may be identified as contributing factors to fair housing obstacles, and in other cases they may serve as catalysts for fair housing change. TDA will discuss the impact of these policies with the City and ensure that the fair housing goals that are developed in Phase III reflect the challenges, opportunities, and realities of the legal and policy environment that is unique to the area.



Task C: Conduct Community Outreach and Consultation

HUD guidance contemplates an extensive public participation and community engagement process to ensure that a fair housing study includes all relevant perspectives. TDA proposes to accomplish these goals by providing substantial opportunities for engagement and outreach to those served by the City.

Specifically, this task includes outreach efforts, both interviews and community meetings held regionally, to obtain perspectives of various interested parties. Members of our team will conduct focus group meetings to fully engage stakeholders and support and hold a public meeting to gain public comment on the plan. The following traditional fair housing stakeholders in the City will be encouraged to participate:

- Advocacy groups (i.e., affordable housing, persons with disabilities, social justice)
- Faith-based organizations
- Affordable housing developers operating in the study area
- Banks and other financial institutions
- Educational institutions
- Continuum of Care Board
- Fair housing organizations
- Neighborhood associations or groups/general public within the study area
- Organizations and agencies that serve protected classes as well as low-income families
- Other stakeholder groups as identified by the City.

In order to address the particular challenges of the fair housing study, TDA's engagement and outreach involves a range of outreach methods:

- *Fair housing survey* – Web-based survey instruments, specifically designed for different types of stakeholders, will be distributed by TDA. TDA will coordinate closely with the



City to determine the methodology to be used to advertise and distribute the surveys but initially expects to promote the surveys through identified stakeholders. All the raw data collected will be provided to the City along with a summary of the results with themes appropriately highlighted.

- *Targeted stakeholder interviews* – To obtain additional more detailed perspectives, TDA will conduct telephone interviews with various stakeholders. Stakeholder interviews are intended to obtain “official positions” of various key constituencies such as planning officials and fair housing advocates (Fair Housing centers), etc.
- *Conduct focus groups and other consultation meetings* – To further provide opportunities for stakeholder, advocates, and members of the public to provide in-person input, TDA expects to hold a series of focus groups/public meetings. Each session may be promoted through the same channels noted in the survey description above or could be organized by invite to ensure a diverse representation at each session. The purpose of these focus groups is to more deeply explore issues that have been identified via the questionnaires and initial research by TDA, to allow different constituencies to engage one another’s perspectives, and to identify key regional variations. Community residents and other interested parties will be encouraged to participate in the public meetings, and TDA will facilitate an interactive dialog that helps to illuminate fair housing nuances that are not easily explored through the other methods of outreach.

TDA provides a list of individuals and groups participating in each engagement and outreach activity, develops a summary of activities and comments received, and provides a copy of agendas and sign in sheets. TDA expects that the City will provide or identify free spaces for meetings, assist in advertising the community meetings and surveys, and follow-up with stakeholders to confirm attendance at focus groups, etc. Subject to further consultation, TDA expects to hold four (4) meetings spread across the City at locations acceptable to the City.



- One (1) for advocacy groups
- One (1) for nonprofit service providers and affordable housing developers
- One (1) for fair housing-related organizations
- One (1) for governmental agencies

Our community outreach team is exceptionally well-positioned to carry out a meaningful community engagement process. Both Madeline Fraser Cook and Henry Alvarez have long track records of working with diverse communities across a broad range of geographies and cultural backgrounds. Ms. Fraser Cook is a native Spanish speaker who often translates her presentations into Spanish.

PHASE III – FAIR HOUSING PLANNING

The third phase of TDA’s approach helps determine whether policies, practices, programs, and activities restrict fair housing choice and access to opportunity. Where restrictions are identified, TDA assesses what factors are contributing to these barriers. This phase then enables those jurisdictions and agencies to develop a plan for addressing the restrictions.

Task A: Develop Preliminary Findings and Recommendations

Based on results of the research and public engagement efforts, TDA will identify fair housing issues in the community. Specifically, this step identifies the fair housing issues, disparities in access to opportunity, and disproportionate housing needs. It also examines fair housing issues related to publicly supported housing, disability and access, and fair housing enforcement, outreach capacity, and resources.

TDA provides a draft list of findings and conclusions to program participants. With guidance from City officials, TDA will assist in planning actions address impediments to fair



housing choice or access to opportunity and negatively impact fair housing or civil rights compliance.

TDA's recommendations are distinguished by the fact that they present meaningful actions drawn from the team's combination of (1) practical experience; (2) thorough understanding of HUD guidelines; and (3) careful consideration of the unique characteristics, challenges, and opportunities of the region. Strategies feature actions designed to achieve a material, positive change that affirmatively furthers fair housing, for example, increasing fair housing choice or decreasing disparities in access to opportunity. To assist its clients in implementing goals and priorities set in a study, TDA outlines strategies in a separate detailed action plan that serves as a road map of necessary actions to be taken by program participants.

Task B: Produce Final AI and Related Documents

Based on review and comment from program participants and the public, TDA will prepare the final Analysis of Impediments that includes all the required elements.



Schedule¹:

TASKS	MONTH/YEAR
Contract Signed	October 2019
Public Meetings Review of Background Information for Plans Determination of Source Data for Plans Collection and Analysis of Data for Plans Preparation of Demographic Profiles Review of Background Information on Plan & Study. Determination of Source Documentation Preparation of Demographic Profiles for both Plan & Study	November - December
Draft Con Plan/Action Plan/AI	January 2020
Draft Con Plan/Action Plan/Ai due to City's/Cities staff Review. Revise as requested.	January 2020
Final Draft Con Plans/Action Plans/AI submitted to City/Cities in paper, electronic format suitable for posting to jurisdictions websites and printing by staff for distribution for public review	February 2020
30 day Public Review Period	March – April 2020
Revisions to address public comments completed	May 8, 2020
Final Plan(s) submitted to HUD via eCon Planning Suite	May 15, 2020

TAB 5. Exceptions
None.

¹ Note these dates are estimated at this time; actual dates and times will be determined in consultation with City Staff



TAB 6. Additional Information

A list of Similar Services to those sought by this RFP that the Contractor has provided to other businesses or governmental entities.

CUSTOMER/ORGANIZATION NAME	ADDRESS	DESCRIPTION OF SERVICES
Tucson, AZ	P O Box 27450, Tucson, AZ 85726	Training for Housing and Community Development
Contra Costa County, CA	30 Muir Rd, Martinez, CA 94553	Consolidated Plan, Action Plan and Analysis of Impediments
State of South Carolina	300-C Outlet Pointe Blvd , Columbia, SC 29210	Assessment of Fair Housing
Clayton County, GA	7994 N. McDonough St., Jonesboro, GA 30236	Assessment of Fair Housing
ABT Associates	450 Montgomery Ave. Ste. 800, North Bethesda, MD 20814	Develop materials-CDBG
Mobile County, AL	205 Government Street, Mobile, AL 36644	Remote technical assistance-HOME Program, Consolidated Plan
Dept. of Housing & Urban Development (HUD)		HUD 2015 and 2016 Community Compass Awards
Los Angeles, CA CDC	700 W. Main Street, Alhambra, CA 91801	Grants Management counseling services
Collaborative Solutions	PO Box 130159, Birmingham, AL 35213-0159	Remote training, assessments of peer network for Rural Capacity Building project
South Dakota HDA	PO Box 1237, Pierre, SD 57501	On-site Sessions on HOME Rental Agreement & Compliance
Housing Services, Inc.	1160 Galicia Lane, Dallas, TX 75217	On-Call Remote TA for HOME Program
Montgomery, AL	25 Washington Ave. Montgomery, AL 36104	Project Review Affordable Rental Housing, Remote & On-site Training Financial Mgmt. and Rental Underwriting
Georgia DCA	60 Executive Park S, NE, Atlanta, GA 30329	On-Call Remote TA for HOME Program Mgmt.
Groundworks USA	22 Main Street, Yonkers, NY 10701	Webinars, Working Groups, On-line Resource Materials, Direct TA
Snohomish County, WA	3000 Rockefeller Avenue, M/S 3 Everett, Washington 98201	Consulting & On-site Training HOME Agreement Boilerplate Review Project
Community Housing Network	570 Kirts Blvd., Troy, MI 48084	Review of CHN's Space & Rent Calculations
Gainesville, FL	633 NW 8th Avenue, Gainesville, FL 32601	Remote TA for HOME Homebuyer Assistance
Fresno, CA	Silvercrest Inc. 1331 Fulton Mall Fresno, CA 93721-1630	Consulting Services for CDC Capacity Building
Charleston, SC	Accounts Payable, PO Box 853 Charleston, SC 29402	Consulting Services for AI to Fair Housing and Consolidated Plan
Oregon CHS	725 Summer St., Ste.B Salem, Oregon 97301-1266	Review & Revise HOME Program Documents; On-Call Consulting Services for HOME Program Mgmt.
State of Michigan	MSHDA 735 East Michigan Avenue, Lansing, MI 48912	Consulting for Fair Housing Impediments
West Virginia HDF	5710 MacCorkle Ave., SE Charleston, WV 25304	Evaluate & Recommend HOME Policies & Procedures
Housing Services Inc.	1160 Galicia Lane, Dallas, TX 75217	Home Training
National Council of State Housing Agencies	444 North Capitol, NW Suite 438 Washington, DC 20001	HOME Training
Lake County, IL	18 North County 9th floor, Waukegan, IL 60085	Consolidated Plan

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



Richmond, CA	P.O. Box 4046, Richmond, CA 94804-0046	Consolidated Plan
Fall River, MA	1 Government Center Fall River, MA 02722	Housing Market Study
NCDA	211 Bridge Avenue Murfreesboro, TN 37129	Training
State of Hawaii	50 Wailuku Drive Hilo, HI 96720	IDIS Training
Washington DOC	Dept. of Commerce, 1011 Plum St. SE Olympia, WA 98504	Review of HOME Written agreements and On Call Consulting Services
Florida Housing Finance Corp	227 N. Bronough Street Tallahassee, FL 32301	Consulting
State of Connecticut	505 Hudson St., Hartford, CT 06106	Technical Assistance
State of Pennsylvania	PO Box 69180, Harrisburg, PA 17106	Analysis of Impediments
Knox County	400 Main Street, Ste.630 Knoxville, TN 37902	Consolidated Plan
Hattiesburg, MS	Dept. of F&S Prog, PO Box 1898 Hattiesburg, MS 39403-1898	HOME Training
Cardinal Engineering	1015 North Broadway Oklahoma City, OK 73102	CDBG Consulting
City of Passaic, NJ	330 Passaic Street, Passaic, NJ 07055	Consulting
Capital Access	325 Chestnut Street, Ste. 917 Philadelphia, PA 19106	NY State Disaster Recovery
Dallas County, TX	2377 N. Stemmons Freeway #724 Dallas, TX 75207	Technical Assistance
City of Irving, TX	825 W. Irving Blvd. Irving, TX 75060	Consulting
City of East Orange, NJ	44 City Hall Plaza, E. Orange, NJ 07019	Training
Housing Assistance Council	10100 Ambassador Drive Ste.310 Kansas City, MO 64153	Training
Hartford County, MD CDCD	319 South Main Street, Bel Air, MD 21014	Training
Columbia, MD	Daniel Boone Bldg.701E.Broadway Columbia, MO 65201	Training
Daly City, CA	333-90th St., Daly City, CA 94015-1895	HOME Training
Elizabeth, NJ	City of Elizabeth 50 Winfield Scott Plaza Elizabeth, NJ 07201-2462	Training
City of Passaic, NJ	330 Passaic Street, Passaic, NJ 07055	Consolidated Plan
Greenville, NC	201 W. Fifth Street, Third FL. Greenville, NC 27834	Training
Greater Lansing Housing Coalition	600 West Maple St., Lansing, MI 48906	Training
State of Maryland DHCD	100 Community Place Crownsville, MD 21032	Training
City of Peoria	419 Fulton, Ste. 207, Peoria, IL 61602	Consolidated Plan
McKeesport PHA	2901 Brownlee Avenue,2nd Floor McKeesport, PA 15132	Training
Baltimore County, MD	400 Washington Avenue Room 148 Towson, MD 21204-4665	Training IDIS
Toledo, OH LISC	245 N. Superior St. 2nd Floor Toledo, OH 43604	Training
ACE - Affordable Community Environment	PO Box 61446, Vancouver, WA 98666	Training

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



TAB 7. Required Forms

TAB 8. Additional Consideration – Housing Condition Windshield Survey

Ibid proposal content.

TAB 9. Detailed Cost of Services

Under Separate Sealed Envelope.



RESUMES

MADLINE FRASER COOK PROJECT MANAGER, TDA

Professional Summary

Madeline Fraser Cook, TDA Project Manager, is a national expert in providing technical assistance to community-based organizations on a variety of housing and community development topics. She specializes on green design and sustainable community development techniques. She is a LEED accredited professional and has extensive experience with incorporating smart growth strategies into community development plans with an emphasis on equity issues. She also has experience in community process and issue-based organizing related to neighborhood planning as well as non-profit fundraising, organizational networking, and information dissemination. In addition, Ms. Fraser Cook has extensive experience working with community-based organizations on engagement processes that ensure active, meaningful involvement from community members.

Professional Experience

Affordable Housing and Community Development

- **Project Manager, TDA Consulting** – Provide technical assistance to HUD grantees on a variety of topics including financial management, specific HUD programs (e.g. CDBG, CDBG-DR, HOME) and provide assistance to HUD’s Office of Economic Resilience through their Better Buildings Challenge program. Develop curricula for various HUD programs and offices including the latest Financial Management Curriculum and the Small Contractor Initiative Curriculum.
- **Analyst, Abt Associates, Inc.** - Implemented program management for HOPE VI grants and assisted housing authorities with HOPE VI HUD Expeditor projects. Also, developed viability assessments of housing authorities’ public housing stocks, and conducted interim assessment of EZ/EC national program design features and experiences of the individual EZ/EC sites.
- **Consultant, Oxfam America** - Logistics Coordinator and member of the Design Team for the Oxfam America U.S. Program National Conference held in May 2000. Participated in the design of session content for the workshops on housing, health, poverty issues and workers' rights in the context of globalization and coordinated travel and accommodations for all participants.
- **Intern, The Community Builders** - Assisted in operating cost analysis for affordable housing developments. Goal was to establish a benchmark per unit operating cost figure

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



for different types of developments. Conducted a social services needs assessment of Heritage Common, Lawrence, MA. Helped organize residents of Heritage Common into a tenants group in order to improve communications with management.

- **Intern, Working Capital** - Researched different types of minority owned small businesses in Lawrence, MA. Interviewed entrepreneurs in Spanish to determine how they financed their businesses and what the incentives were for going into business on their own. Wrote a report for use in a foundation evaluation of the program.
- **Principal/Financial and Data Consultant, Triad Resources** - Analyzed, developed, and implemented strategic applications and plans for financial and real estate markets. Member of a team of specialists that developed technological and web-based applications. Conducted on-line and institutional research.
- **Data Analyst, Hamilton Securities Group** - Assisted in the procurement of data and place-based information, and the creation of tools to analyze and model results and impacts of policy changes. Wrote business plans and pro formas for small businesses. Provided information to Hamilton decision-makers on issues related to current projects and contracts.

Education

- **Translator/Interpreter, Fairfax County Public Schools** - Translated in English and Spanish for parent/teacher conferences. Arranged meetings between school staff and interpreters of various languages. Conducted data entry for the home schooling department. Translated documents from English to Spanish and interpreted for Latino students during developmental testing.
- **Teacher, Fox Valley School** - Taught Spanish to pre-K - 12th grade students with learning disabilities and behavioral problems. Also taught sixth grade English.

Environmental Sustainability

- **Program Director, Green Development Center, Local Initiatives Support Corporation** - Headed the Green Development Center which provided technical and financial resources to LISC local offices and their community partners around affordable housing and community development. Advocated for national policies that facilitate implementation of green development. Forged national partnerships to bring experts on sustainability and smart growth to the table around community development projects. Coordinated fundraising efforts for the GDC as well as partnerships with other LISC national programs and local offices.
- **Vice President, New Ecology, Inc.-** Managed greening of affordable housing developments, shepherding developers through the Leadership in Energy and Environmental Design (LEED) certification process. Developed, coordinated and presented training seminars on costs and benefits of greening affordable housing.

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



Designed and built web-based social networking and information dissemination tools. Supervised research initiative and co-authored *Costs and Benefits of Green Affordable Housing* report, an international resource for community developers. Co-directed New Ecology's strategic planning and research initiatives. Planned, administered, and implemented fundraising efforts.

- **Director of Special Projects, New Ecology, Inc.** - Director of NEI's Green CDCs Initiative. Initiated statewide educational efforts around green affordable housing and sustainable development targeted at community developers. Project work focused on green affordable housing, community development, community organizing, public health and environmental policy.

Education and Professional Certifications

- Masters of City Planning, Department of Urban Studies and Planning, Housing and Community Economic Development Program Group, Massachusetts Institute of Technology, HUD Fellow
- B. A., Swarthmore College, Swarthmore, PA, Political Science and Economics
- Leadership in Energy and Environmental Design (LEED) Accredited Professional

Employment History

- Project Manager, TDA, Belmont, MA – 2012 to Present
- Program Director, Green Development Center, Local Initiatives Support Corporation, Boston, MA – 2008 to 2012
- Vice President, New Ecology, Inc., Cambridge, MA – 2004 to 2008
- Director of Special Projects, New Ecology, Inc., Cambridge, MA – 2001 to 2004
- Analyst, Abt Associates, Inc., Cambridge, MA – 2000 to 2001
- Consultant, Oxfam America, Boston, MA - 2000
- Intern, The Community Builders, Boston, MA – 1999 to 2000
- Intern, Working Capital, Cambridge, MA - 1998
- Principal/Financial and Data Consultant, Triad Resources, Alexandria, VA – 1997 to 1998
- Data Analyst, Hamilton Securities Group, Washington, D.C. – 1996 to 1997
- Translator/Interpreter, Fairfax County Public Schools, VA – 1995 to 1996
- Teacher, Fox Valley School, Bethesda, MD - 1995

Professional Memberships

- Board member, Conservation Law Foundation, MA Board, Boston, MA – 2012 to present

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910.277.1275 • 910.277.2816 Fax • www.tdainc.org



- Board member, Smart Growth America, Washington, D.C. – 2010 to Present
- Member, Town of Belmont, MA Energy Committee – 2013 to 2014
- Board member, Emerald Cities Collaborative, Washington, D.C. – 2010 to 2012
- Board member, ZUMIX, Inc., Boston, MA – 2004 to 2010
- Board member, Boston GreenSpace Alliance, Boston, MA – 2003 to 2005

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



JENNIFER ALPHA
PROJECT MANAGER, TDA

Professional Summary

Ms. Alpha has 18 years of diverse experiences in affordable housing and community development. Ms. Alpha assists clients in improving communities through the use of many housing and community development programs, including the Low Income Housing Tax Credit (LIHTC) program, HOME, CDBG, NSP, the Affordable Housing Program, the Self-Help Housing Program, Public Housing Capital and Operating Funds, Section 8, and others. Ms. Alpha has worked with clients across the country on the development of affordable housing using private, federal, state, and local funds, all of which combined complex financing mechanisms and layered subsidies. Ms. Alpha's work includes assisting with structuring legal, financial, and social development projects; providing guidance to clients on a range of federal regulatory issues; and analyzing housing issues and developing reports; and working as a liaison between diverse stakeholders. Ms. Alpha formerly was a partner in a DC-based law firm that represented public and nonprofit organizations engaged in affordable housing and community development transactions. She also worked in the federal government on the analysis and evaluation of federal housing programs.

Professional Experience

Technical Assistance and Training

- **TDA/ In Person Training Deliveries** - Ms. Alpha is a HOME-Certified Specialist-Regulations and has delivered trainings across the country to HUD grantees and their subrecipients. Training topics have included Building HOME, Financial Management for Participating Jurisdictions, HOME Income Determination, Effective Written Agreements, and the Disaster Recovery Grant Reporting system
- **TDA/ Needs Assessments and TA Delivery** – Ms. Alpha participates on the One CPD and NSP technical assistance teams to assess grantee capacity related to compliance with regulatory requirements, establishment of policies & procedures, project development skills, management & staffing, and organizational resources. Ms. Alpha also engages in onsite and remote delivery of targeted technical assistance with emphasis on written agreements, cross cutting federal requirements, and project structuring.
- **TDA/ Neighborhood Stabilization Grant Closeout and Coordination** – Ms. Alpha assist HUD with the coordination of the NSP closeout efforts and has co-authored procedural guidance to assist grantees with closeout. Ms. Alpha works directly with grantees to understand closeout criteria, assess readiness for closeout, and clear obstacles that may prevent closeout. She serves on the NSP Ask-A-Question pool and frequently presents webinars on a range of NSP topics.

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



Housing Analysis

- **TDA/ Fair Housing Analysis**– Ms. Alpha has led TDA teams in the coordination and development of Analysis of Impediments to Fair Housing for city, county, and state clients. Her work in this area includes data analysis to reveal trends that affect fair housing choice; public outreach and stakeholder engagement to collect on-the-ground information about obstacles and opportunities in fair housing; review and analysis of fair housing complaints; and development of findings to illustrate fair housing concerns; and consultation with clients to develop recommendations that most effectively address findings within a client’s available resources.
- **TDA & GAO/ Housing Data Analysis**- Ms. Alpha spent two years at the U.S. Government Accountability Office where she reviewed housing programs including the Low Income Housing Tax Credit program, the Neighborhood Stabilization Program (NSP), and the Public Housing Program. Through these reviews, she collected original data on housing development outcomes and analyzed existing data collected by HUD and Treasury to assess progress toward program goals. This experience provided a unique insight into how both federal agencies and Congress use, evaluate, and value data on outcomes related to housing and community development programs.

Affordable Housing and Community Development

- **TDA/ Program Design and Implementation** – Ms. Alpha provides assistance to state and local governments, nonprofit organizations, and other agencies in the design, structure, finance, and implementation of housing and community development programs. She assists with structuring of written agreements, rental housing compliance, and coordination of HUD resources with Low Income Housing Tax Credit (LIHTC) transactions.
- **TDA and GAO/ Regulatory Compliance Review** – Ms. Alpha has reviewed a range of housing and community development programs for compliance with regulations and internal policies and procedures at the federal and local level. She has evaluated program performance and developed recommendations for achieving outcomes. Further she assists clients in structuring monitoring systems to ensure ongoing compliance and proper documentation of review.
- **Reno & Cavanaugh/ Mixed Income, Mixed Finance, Mixed Use** – Ms. Alpha has worked on complex transactions that combine a range of financing sources into single projects that provide diverse living environments as well as on-site amenities. These projects often provide the important retail and community resources that were previously lacking in a distressed community. In addition to ensuring affordability requirements for low income residents, incorporating these features into residential construction requires careful legal and planning considerations to protect the rights of tenants, establish the responsibilities of the parties, and ensure proper documentation of agreements. Ms. Alpha has also helped structure mixed-income, integrated condominium projects involving rental public



housing, affordable rental and homeownership units, and market rate for-sale units, with a bifurcated construction/operations ownership structure and phased regulatory releases.

- **Reno & Cavanaugh/ Public Housing Administration** – Ms. Alpha has worked with public housing agencies across the county to help them understand HUD’s rules for the use of public housing operating subsidies, the Section 8 Housing Choice Voucher program, and the Moving to Work program. In this capacity, she has assisted clients in problem solving and managing programs to comply with federal requirements.
- **Reno & Cavanaugh/ HOPE VI Across the U.S.** - Ms. Alpha assisted public housing authorities across the country in a dozen states from California to Connecticut with the structuring and implementation of their HOPE VI grants to improve neighborhoods through leveraging public and private funds. This assistance has included guidance on financing mechanisms and private financing options, local government approvals and participation, resident engagement, HUD-assisted housing program requirements, and federal cross cutting requirements such as Davis Bacon and Environmental Review.
- **Reno & Cavanaugh/ Chicago’s Plan for Transformation** - Ms. Alpha served as special counsel to the Receiver of the Chicago Housing Authority to assist with the legal and program management of the largest and most comprehensive redevelopment of public housing in the nation’s history involving the planned redevelopment of 25,000 units and nine public housing sites into revitalized, mixed-income communities. Using the HOPE VI program as a catalyst for redevelopment, the Plan for Transformation brought together stakeholders across the city and the country to effect changes in distressed neighborhoods. As special counsel, Ms. Alpha managed the affordable housing development teams consisting of dozens of public and private partners; negotiated and drafted transactional documents, including documents required by the LIHTC, HOME, CDBG, and Federal Home Loan Bank programs; assisted in developing the terms for the use public housing operating subsidies; and guided transactions through the HUD approval processes.

Education and Professional Certifications

- J.D., University of Pittsburgh School of Law, 2001
- M.P.A, Public Management & Policy, University of Pittsburgh Graduate School of Public and International Affairs (GSPIA), 2001
- Certification in Nonprofit Management, University of Pittsburgh, GSPIA, 2001
- B.A., Political Science/English Writing, University of Pittsburgh, 1996
- HOME Certification- Regulations

Employment History

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



PAMELA J. PAIGE
SENIOR PROJECT ASSOCIATE, TDA

Professional Summary

Pamela Paige has over fifteen years of experience as program manager within a variety of organizations including grassroots community development organizations dedicated to improving quality of life. Responsibilities evolved into expertise in project management, project support, capacity building, and public engagement. Managed comprehensive community outreach and public engagement initiatives including multi-tiered outreach and public meetings. Spent twenty years managing tenant relations for real estate rental businesses.

Professional Experience

Project Support

- **TDA, Inc.** – Currently in the seventh year of conducting activities to support HUD grant contract compliance for billing and reporting; providing support for technical assistance projects including populating the HUD online database (WASS) for the AFHs; providing logistical and registration management for HUD trainings and workshops; and managing assignments for HUD Ask-A-Question database.
- **Greater Northwest Community Coalition, Inc.** - As only paid staff for three years, prepared the federal, state, local, and foundation grant reports, published monthly newsletter, compiled and distributed Board of Directors and committee agendas, reports, and minutes. Worked with federal and state auditors. Responded directly to hundreds of people per year.
- **Paige Real Estate Management** – For nearly 20 years, managed accounts receivable and accounts payable, drafted and monitored asset management budgets, worked with tax preparer. Managed tenant lease processes and relations.

Public Engagement

- **TDA, Inc.** – Provided support during focus groups and stakeholder interviews for the Clayton County, GA Assessment of Fair Housing project.
- **Greater Northwest Community Coalition, Inc.** – Managed two-year comprehensive Strategic Neighborhood Action Plan Initiative, provided administrative, marketing, and logistical support, which covered quality of life, academic, economic development, and housing. Facilitated collaboration of 26 neighborhoods associations, 300 community members, business partners, and government officials during a combined 50 forum, committee, and neighborhood meetings. Managed the moveable parts; worked with a diverse population of volunteers; researched best methods for holding various types of

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



public meetings to ensure desired outcomes, planned and facilitate events; made attendees feel confident that their voices will be heard and that their suggestions will be considered as part of the process. Practiced public advocacy as representative during neighborhood, city/state and funding agency meetings.

- **Making The Connection** – Contracted with Baltimore City Public Schools to provide Family Engagement Services to a middle school challenged with low parent and family participation, and high truancy and discipline rates.
- **Coppin State University** – As an Adult Learning Instructor, developed four computer-based workforce development courses and delivered them free to adult students during forty public training sessions.

Capacity Building

- **Greater Northwest Coalition** - Developed proposals that secured funding; administered federally, state and privately funded public safety, neighborhood revitalization, and senior housing repair programs.
- **TuTTie's Place** – Developed and implemented strategies for increasing the organization's image and online presence, seeking funding, developing youth-based programs, applying for grants, and seeking donations from individuals and businesses.

Education and Professional Certifications

- Bachelor of Science, Business Management, University of Baltimore, Maryland

Employment History

- Senior Project Associate, TDA Consulting, Inc. – 2010 to Present
- Program Director, Making The Connection – 2010 to Present
- Adult Learning Instructor, Coppin State University – 2010 to 2013
- Marketing Specialist, TuTTie's Place – 2006-2009
- Program Director, Greater Northwest Community Coalition, Inc. – 2002-2005
- Secretary/Treasurer, Paige Real Estate Management – 1993-2005
- Administrative Specialist, Garwyn Oaks Housing, Inc. – 2001-2002
- Technical Support Manager, St. Paul Companies, Inc. – 1980-1999

Professional Affiliations and Awards

- Baltimore Cash Campaign, Financial Coach, 2 years



ERICH CHATHAM
MANAGING PARTNER, CIVITAS, LLC

Professional Summary

Erich Chatham, managing partner of Civitas, a community and economic development consulting firm based in Charleston, SC, that regularly partners with TDA, has been a key part of TDA's team across the country on regional and statewide AIs and more recently on AFHs. He has gained nearly 10 years' experience working on economic and community development projects with local governments, for-profits and nonprofits across South Carolina, North Carolina, Louisiana, Florida, Georgia, California and Texas. Chatham works with local governments on urban revitalization initiatives utilizing CDBG program funding. He also recently worked with several OneCPD grantees to overhaul HOME and CDBG policies and procedures manuals to conform to updated HUD regulations. Chatham also has extensive experience working with the new eCon Planning suite and serves as an IDIS trainer. Chatham holds an MPA from the College of Charleston, and a BA in history from Oglethorpe University.

Professional Experience

- Managing Partner, Civitas, LLC – 2008 to Present: As Managing Partner Erich has served a wide range of client's technical assistance needs including:
- Training and Development Associates (TDA) Subcontract technical assistance providers for national level HUD One CPD programs including CDBG, HOME, NSP, eCon Planning, DRGR, IDIS, & ESG.
- Consolidated Planning & Analysis of Impediments to Fair Housing Choice
- NALCAB – National Association for Latino Community Asset Builders to Subcontract technical assistance providers for national level HUD One CPD programs including CDBG, HOME, NSP, eCon Planning, DRGR & IDIS
- The NRP Group Low Income Housing Tax Credit (LIHTC) project development
- Multi-family Residential Development Feasibility
- Front Porch Strategies Affordable Housing Development Consulting
- HUD One CPD program monitoring and grantee technical assistance including IDIS training
- City of Spartanburg, South Carolina Consolidated Planning, Analysis of Impediments to Fair Housing Choice HOME & CDBG policies and procedures development.

California • Delaware • Georgia • Louisiana • Maryland • Massachusetts • Michigan • North Carolina • Pennsylvania • South Carolina • Texas • Vermont • Washington, DC

Administrative Office: 131 Atkinson Street, Suite B, Laurinburg, NC 28352 910. 277.1275 • 910.277.2816 Fax • www.tdainc.org



- Horry County, South Carolina o Consolidated Planning & Analysis of Impediments to Fair Housing Choice
- Waccamaw Regional Council of Governments Consolidated Planning, Regional Housing Needs Assessment O Analysis of Impediments to Fair Housing Choice
- Charleston County, SC & City of North Charleston, SC Consolidated Planning Assistance & Data Collection
- Myrtle Beach Housing Authority NSP project monitoring and compliance reporting
- Grand Strand Housing & CDC HOME & LIHTC rental housing project development
- Town of Bluffton, SC NSP project monitoring and compliance reporting
- Homes of Hope
- HOME rental housing project development Charleston County, SC & City of North
- Graduate Intern, Urban Land Institute South Carolina – 2008
- Graduate Assistant, College of Charleston – 2006 to 2007
- Teacher, Economics & Government, Department Chair and Head Coach, Our Lady of Mercy Catholic High School – 2002 to 2006

Education and Professional Certifications

- M.P.A., The College of Charleston
- B.A., History, Oglethorpe University
- Georgia Secondary Education Certificate, Social Studies, Oglethorpe University
- Member, National Association of Housing & Redevelopment Officials
- GIS Technician & Analyst
- HUD - Certified Housing Counselor (as certified by The Association of Housing Counselors)
- HUD – HOME Program Certified Specialist: Rules & Regulations