

CITY OF PERRIS

CONTRACT SERVICES AGREEMENT FOR

PREPARATION OF 2024-2029 CONSOLIDATED PLAN AND ANALYSIS OF

IMPEDIMENT TO FAIR HOUSING CHOICE

This Contract Services Agreement ("Agreement") is made and entered into this 29th day of August, 2023, by and between the City of Perris, a municipal corporation ("City"), and TDA Consulting Inc., a [California corporation] ("Consultant").

NOW, THEREFORE, the parties hereto agree as follows:

1.0 SERVICES OF CONSULTANT

1.1 Scope of Services. In compliance with all of the terms and conditions of this Agreement, Consultant shall perform the work or services set forth in the "Scope of Services" attached hereto as *Exhibit "A"* and incorporated herein by reference. Consultant warrants that all work or services set forth in the Scope of Services will be performed in a competent, professional and satisfactory manner. Additional terms and conditions of this Agreement, if any, which are made a part hereof are set forth in the "Special Requirements" attached hereto as *Exhibit "B"* and incorporated herein by this reference. In the event of a conflict between the provisions of *Exhibit "B"* and any other provisions of this Agreement, the provisions of *Exhibit "B"* shall govern.

1.2 Compliance With Law. All work and services rendered hereunder shall be provided in accordance with all ordinances, resolutions, statutes, rules and regulations of the City and any federal, state or local governmental agency of competent jurisdiction.

1.3 Licenses, Permits, Fees and Assessments. Consultant shall obtain, at its sole cost and expense, such licenses, permits and approvals as may be required by law for the performance of the services required by this Agreement.

2.0 COMPENSATION

2.1 Contract Sum. For the services rendered pursuant to this Agreement, Consultant shall be compensated in accordance with the "Schedule of Compensation" attached hereto as *Exhibit "C"* and incorporated herein by this reference, but not exceeding the maximum contract amount of fifty six thousand, six hundred and forty six dollars (\$56,646.00) ("Contract Sum").

2.2 Method of Payment. Provided that Consultant is not in default under the terms of this Agreement, Consultant shall be paid upon receipt of an invoice, in a form approved by the City Manager, describing the services performed.

3.0 COORDINATION OF WORK

3.1 Representative of Consultant. **Jennifer Alpha** is hereby designated as being the representative of Consultant authorized to act on its behalf with respect to the work or services specified herein and make all decisions in connection therewith.

3.2 Contract Officer. The City's City Manager is hereby designated as being the representative the City authorized to act in its behalf with respect to the work and services specified herein and make all decisions in connection therewith ("Contract Officer"). The City may designate another Contract Officer by providing written notice to Consultant.

3.3 Prohibition Against Subcontracting or Assignment. Consultant shall not contract with any entity to perform in whole or in part the work or services required hereunder without the express written approval of the City. Neither this Agreement nor any interest herein may be assigned or transferred, voluntarily or by operation of law, without the prior written approval of City. Any such prohibited assignment or transfer shall be void.

3.4 Independent Contractor. Neither the City nor any of its employees shall have any control over the manner, mode or means by which Consultant, its agents or employees, perform the services required herein, except as otherwise set forth on *Exhibit "A"*. Consultant shall perform all services required herein as an independent contractor of City and shall remain under only such obligations as are consistent with that role. Consultant shall not at any time or in any manner represent that it or any of its agents or employees are agents or employees of City.

4.0 INSURANCE AND INDEMNIFICATION

4.1 Insurance. Consultant shall procure and maintain, at its sole cost and expense, in a form and content satisfactory to City, during the entire term of this Agreement including any extension thereof, the following policies of insurance:

(a) Commercial General Liability Insurance. A policy of commercial general liability insurance using Insurance Services Office "Commercial General Liability" policy form CG 00 01, with an edition date prior to 2004, or the exact equivalent. Coverage for an additional insured shall not be limited to its vicarious liability. Defense costs must be paid in addition to limits. Limits shall be no less than \$1,000,00.00 per occurrence for all covered losses and no less than \$2,000,000.00 general aggregate.

(b) Workers' Compensation Insurance. A policy of workers' compensation insurance on a state-approved policy form providing statutory benefits as required by law with employer's liability limits no less than \$1,000,000 per accident for all covered losses.

(c) Automotive Insurance. A policy of comprehensive automobile liability insurance written on a per occurrence basis in an amount not less than \$1,000,000.00 per accident, combined single limit. Said policy shall include coverage for owned, non owned, leased and hired cars.

(d) Professional Liability or Error and Omissions Insurance. A policy of errors and omissions insurance in an amount not less than \$1,000,000.00 per claim with respect to loss arising from the actions of Consultant performing professional services hereunder on behalf of the City.

All of the above policies of insurance shall be primary insurance. The general liability policy shall name the City, its officers, employees and agents ("City Parties") as additional insureds and shall waive all rights of subrogation and contribution it may have against the City and the City's Parties and their respective insurers. All of said policies of insurance shall provide that said insurance may be not cancelled without providing thirty (30) days prior written notice by registered mail to the City. In the event any of said policies of insurance are cancelled or amended, Consultant shall, prior to the cancellation or amendment date, submit new evidence of insurance in conformance with this Section 4.1 to the Contract Officer. No work or services under this Agreement shall commence until Consultant has provided City with Certificates of Insurance or appropriate insurance binders evidencing the above insurance coverages and said Certificates of Insurance or binders are approved by City.

Consultant agrees that the provisions of this Section 4.1 shall not be construed as limiting in any way the extent to which Consultant may be held responsible for the payment of damages to any persons or property resulting from Consultant's activities or the activities of any person or persons for which Consultant is otherwise responsible.

The insurance required by this Agreement shall be satisfactory only if issued by companies qualified to do business in California, rated "A" or better in the most recent edition of Best Rating Guide, The Key Rating Guide or in the Federal Register, and only if they are of a financial category Class VII or better, unless such requirements are waived by the Risk Manager of the City due to unique circumstances.

In the event that the Consultant is authorized to subcontract any portion of the work or services provided pursuant to this Agreement, the contract between the Consultant and such subcontractor shall require the subcontractor to maintain the same policies of insurance that the Consultant is required to maintain pursuant to this Section 4.1.

4.2 Indemnification.

(a) Indemnity for Professional Liability. When the law establishes a professional standard of care for Consultant's services, to the fullest extent permitted by law, Consultant shall indemnify, defend and hold harmless City and the City's Parties from and against any and all losses, liabilities, damages, costs and expenses, including attorneys' fees and costs to the extent same are caused in whole or in part by any negligent or wrongful act, error or omission of Consultant, its officers, agents, employees of subcontractors (or any entity or individual for which Consultant shall bear legal liability) in the performance of professional services under this Agreement.

(b) Indemnity for Other Than Professional Liability. Other than in the performance of professional services and to the full extent permitted by law, Consultant shall indemnify, defend and hold harmless City and City's Parties from and against any liability

(including liability for claims, suits, actions, losses, expenses or costs of any kind, whether actual, alleged or threatened, including attorneys' fees and costs, court costs, defense costs and expert witness fees), where the same arise out of, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Agreement by Consultant or by any individual or entity for which Consultant is legally liable, including but not limited to officers, agents, employees or subcontractors of Consultant.

5.0 TERM

5.1 Term. Unless earlier terminated in accordance with Section 5.2 below, this Agreement shall continue in full force and effect until June 30, 2024.

5.2 Termination Prior to Expiration of Term. Either party may terminate this Agreement at any time, with or without cause, upon thirty (30) days' written notice to the other party. Upon receipt of the notice of termination, the Consultant shall immediately cease all work or services hereunder except as may be specifically approved by the Contract Officer. In the event of termination by the City, Consultant shall be entitled to compensation for all services rendered prior to the effectiveness of the notice of termination and for such additional services specifically authorized by the Contract Officer and City shall be entitled to reimbursement for any compensation paid in excess of the services rendered.

6.0 MISCELLANEOUS

6.1 Covenant Against Discrimination. Consultant covenants that, by and for itself, its heirs, executors, assigns and all persons claiming under or through it, that there shall be no discrimination against or segregation of, any person or group of persons on account of race, color, creed, religion, sex, marital status, national origin, or ancestry in the performance of this Agreement. Consultant shall take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to their race, color, creed, religion, sex, marital status, national origin or ancestry.

6.2 Non-liability of City Officers and Employees. No officer or employee of the City shall be personally liable to the Consultant, or any successor in interest, in the event of any default or breach by the City or for any amount which may become due to the Consultant or to its successor, or for breach of any obligation of the terms of this Agreement.

6.3 Conflict of Interest. No officer or employee of the City shall have any financial interest in this Agreement nor shall any such officer or employee participate in any decision relating to the Agreement which affects his financial interest or the financial interest of any corporation, partnership or association in which he is, directly or indirectly, interested, in violation of any state statute or regulation. The Consultant warrants that it has not paid or given and will not pay or give any third party any money or other consideration for obtaining this Agreement. When requested by the Contract Officer, prior to the City's execution of this Agreement, Consultant shall provide the City with an executed statement of economic interest.

6.4 Notice. Any notice or other communication either party desires or is required to give to the other party or any other person shall be in writing and either served personally or sent by prepaid, first class mail, in the case of the City, to the City Manager and to

the attention of the Contract Officer, City of Perris, 101 North "D" Street, Perris, CA 92570, and in the case of the Consultant, to the person at the address designated on the execution page of this Agreement.

6.5 Interpretation. The terms of this Agreement shall be construed in accordance with the meaning of the language used and shall not be construed for or against either party by reason of the authorship of this Agreement or any other rule of construction which might otherwise apply.

6.6 Integration; Amendment. It is understood that there are no oral agreements between the parties hereto affecting this Agreement and that this Agreement supersedes and cancels any and all previous negotiations, arrangements, agreements and understandings, if any, between the parties, and none shall be used to interpret this Agreement. This Agreement may be amended at any time by a writing signed by both parties.

6.7 Severability. In the event that part of this Agreement shall be declared invalid or unenforceable by a valid judgment or decree of a court of competent jurisdiction, such invalidity or unenforceability shall not affect any of the remaining portions of this Agreement which are hereby declared as severable and shall be interpreted to carry out the intent of the parties hereunder unless the invalid provision is so material that its invalidity deprives either party of the basic benefit of their bargain or renders this Agreement meaningless.

6.8 Waiver. No delay or omission in the exercise of any right or remedy by a non-defaulting party on any default shall impair such right or remedy or be construed as a waiver. A party's consent to or approval of any act by the other party requiring the party's consent or approval shall not be deemed to waive or render unnecessary the other party's consent to or approval of any subsequent act. Any waiver by either party of any default must be in writing and shall not be a waiver of any other default concerning the same or any other provision of this Agreement.

6.9 Attorneys' Fees. If either party to this Agreement is required to initiate, defend or made a party to any action or proceeding in any way connected with this Agreement, the prevailing party in such action or proceeding, in addition to any other relief which may be granted, shall be entitled to reasonable attorneys' fees, whether or not the matter proceeds to judgment.

6.10 Corporate Authority. The persons executing this Agreement on behalf of the parties hereto warrant that (i) such party is duly organized and existing, (ii) they are duly authorized to execute and deliver this Agreement on behalf of said party, (iii) by so executing this Agreement, such party is formally bound to the provisions of this Agreement, and (iv) the entering into this Agreement does not violate any provision of any other Agreement to which said party is bound.

[SIGNATURES ON NEXT PAGE]

IN WITNESS WHEREOF, the parties have executed and entered into this Agreement as of the date first written above.

ATTEST: "CITY"
CITY OF PERRIS

By: _____
Nancy Salazar, City Clerk

By: _____
Clara Miramontes, City Manager

APPROVED AS TO FORM:
ALESHIRE & WYNDER, LLP

By: _____
Robert Kuu, City Attorney

"CONSULTANT"
TDA Consulting Inc., a California Corporation
131 Atkinson St., Ste B
Laurinburg, NC 28352

By: _____
Signature

Print Name and Title

(Corporations require two signatures; *one from each* of the following: A. Chairman of Board, President, any Vice President; *AND B.* Secretary, Assistant Secretary, Treasurer, Assistant Treasurer, or Chief Financial Officer.)

[END OF SIGNATURES]

EXHIBIT "A"

SCOPE OF SERVICES

[See Attached proposal from TDA Consulting Inc. dated August 7, 2023]



CITY OF
PERRIS

**Response to:
Request for Proposals**

**Consolidated Plan (Con Plan)
Analysis of Impediments to Fair Housing Choice**

Submitted August 8, 2022, 5:00 PM

by

TDA Consulting, Inc. ("TDA")



Table of Contents

1.	COVER LETTER.....	3
2.	LEGAL INFORMATION.....	5
3.	DUNS/FEIN.....	5
4.	PROJECT APPROACH.....	6
5.	DESCRIPTION OF CITY PARTICIPATION.....	21
6.	QUALIFICATIONS/EXPERIENCE.....	22
7.	RESUMES.....	25
8.	REFERENCES.....	40
9.	SAMPLE COPIES OF CON PLAN/AI.....	41
10.	WORK PLAN.....	44
11.	FIXED PRICE BUDGET.....	45



1. Cover Letter

August 7, 2023

Sara Cortes de Pavon, Principal Management Analyst
City of Perris – Economic Development Department & Housing Development
135 North D. Street
Perris, CA 92570

RE: REQUEST FOR PROPOSAL CONSOLIDATED PLAN (CON PLAN), ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

TDA, a small, minority woman owned enterprise, has received nearly \$60 million from 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 since 1998. 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.

TDA has developed Consolidated Plans for states of New Mexico and New Jersey as well as dozens of local communities including: Birmingham, AL; Lake County, IL; Lexington County, KY; Burlington, NC; Greenville, NC; Greensboro, NC; High Point, Richland County, NC; Wilmington, NC; Knox County, TN; Luzerne County, PA; Charleston, SC; Charleston County, SC; Horry County, SC; Rock Hill, SC; Nashville-Davidson, TN; San Antonio, TX; Lubbock, TX; Tulsa, OK; Santa Monica, CA; Alexandria, LA; Mount Vernon, NY; Santa Barbara County, CA; Shreveport, LA, Merced, CA,

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



Fargo, ND, and Brownsville, 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 (AI). Most recently, TDA has assisted the State of New Mexico, State of New Jersey, State of South Carolina; State of Michigan; Commonwealth of Pennsylvania; Contra Costa County, CA; Charleston, SC; Clayton County, GA; Clark County, NV; Tulsa, OK; Alexandria, LA; Mount Vernon, NY; Merced, CA; Santa Barbara County, CA; Merced, CA, and Fargo, ND with the completion of their AIs. TDA is currently working with the City of St Louis, MO to complete their AI as well.

In addition to those Consolidated Plans, TDA has completed fair housing studies for state and local jurisdictions, particularly Analyses of Impediments to Fair Housing (AI). Most recently, TDA has assisted the State of New Mexico, State of New Jersey, State of South Carolina; State of Michigan; Commonwealth of Pennsylvania; Contra Costa County, CA; Charleston, SC; Clayton County, GA; Clark County, NV; Tulsa, OK; Alexandria, LA; Mount Vernon, NY; Merced, CA; Santa Barbara County, CA; Merced, CA, and Fargo, ND with the completion of their Ais.

Moreover, TDA, has received nearly \$60 million from 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 since 1998. 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.

Ms. Jennifer Alpha will serve as Executive-In-Charge for this project. If you have any questions, you may contact her at 202.669.8778 (cell) and/or by email at jalpha@tdainc.org 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 – TDA Consulting Inc. TDA Consulting Inc. will be responsible for all deliverables. TDA looks forward to working with the City of Perris (“City”).

2. Legal Information

Legal Name: TDA Consulting Inc.

Address: 131 Atkinson St. Ste B
Laurinburg, NC 28352

Telephone: 910.277.1275

Email: Jalpha@tdainc.org

3. Duns/FEIN

DUNS: 362905312

FEIN (Tax ID): 26-4508272

Sincerely,

A handwritten signature in black ink, appearing to read "Dionne L Roberts", with a long, sweeping horizontal line extending to the right.

Dionne L Roberts
President and CEO



4. Project Approach

TDA will assist the City in preparing a Consolidated Plan acceptable to HUD based on the firm's demonstrated experience and capacity. Our extensive work with HUD has enabled TDA to craft an approach to assisting grantees 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. The Consolidated Plan will be developed using HUD's IDIS-based e-Con Planning Suite. Our consultants have been involved with the eCon Planning Suite since its inception. TDA team members are extremely knowledgeable of the system, attended all relevant HUD trainings on the subject from the onset, and report leads have recently successfully completed HUD-approved Con Plans for the Cities of Tulsa, OK, Santa Monica, CA, Alexandria, LA, Mount Vernon, NY, Santa Barbara County, CO, Shreveport, LA, Fargo, ND, Brownsville, TX and the states of New Jersey and New Mexico using the e-Con Planning Suite. Consultants will utilize the Consolidated Plan template to import all relevant data tables, narratives, charts, and maps into IDIS. TDA will enter the full Consolidated Plan into IDIS and use the eConPlan template to import all relevant data tables, narratives, charts, and maps. TDA will submit the Consolidated Plan and Annual Action Plan to HUD for approval per federal guidelines and in accordance with the submission deadline.

TDA will also aid the City in developing a first-year 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.



TDA will also guide preparation and completion of the 2023 Analysis of Impediments to Fair Housing Choice. TDA has developed a proven methodology for developing sound recommendations to mitigate and address fair housing concerns as shown in a step-by-step approach this is organized under three phases including: orientation, assessment (conducting and analyzing research, outreach, and other data), and planning (preliminary findings and recommendation and final AI document).

TDA team members will coordinate closely with the City to develop a Consolidated Plan, an Annual Action Plan, and an Analysis of Impediments to Fair Housing Choice through a series of meetings and workgroups. Our community outreach team is exceptionally well-positioned to carry out a meaningful community engagement process, and our team members have a long track record of working with diverse communities across a broad range of geographies and cultural backgrounds. When producing AIs in conjunction with Consolidated Plans, TDA combines the outreach to ensure we are covering all concerns that cross the plans. This makes for richer dialogue and a great range of perspectives.

- **Consolidated Plan/Annual Action Plan**

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 City'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.



TDA will virtually host an initial coordination meeting with the City to discuss the project, develop detailed schedules, and collect necessary information to launch the work. 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. Following this initial coordination meeting, TDA will launch the following tasks and activities:

a) **Benchmarks Consistent with Citizen Participation Plan (CPP).** The consultant team will utilize the City to schedule and manage the required public meetings. Major benchmarks to consultation include meeting the following:

- i. *First Public Hearing.* To gather citizen input on housing and community development needs and the proposed Consolidated Plan before it is published for comment.
- ii. *Public Comment Period.* Draft Consolidated Plan Documents will be available on the City's Website and other related City websites for a 30-day period.
- iii. *Second Public Hearing.* Held during the Consolidated Plan 30-day public comment period and will be for review and comment on the Consolidated Plan draft
- iv. *Written Notices of Planned Public Hearings.* Will be posted in accordance with the CPP

b) Communication Plan.

- i. *Point of Contact.* TDA will assign a single individual to coordinate contact with the Joint Partners. Jennifer Alpha, a TDA Senior Consultant, will serve as the lead for the project consultant team and point of contact. The project consultant team has worked together on many engagements to create high quality products and reports. Our team is in constant contact to ensure that we meet timelines and all scope of service elements. Our team will set up bi-weekly standing meetings to ensure the work is being delivered on time and expectations are being met.



Frequency of standing meetings will be adjusted throughout the project as necessary.

- ii. *IDIS Review and Submission.* TDA will assign a team member with access to IDIS for plan review and submission. Key team members are knowledgeable of and have experience developing Con Plans under the system and training grantees on how to use the system. 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. TDA will need to gain access to the City's eConPlanning suite, and any delays in access during this short project delivery timeline could result in additional assistance needed from City staff.
- c) *Note on the Development and Placement of Official Notices.* The consultant team understands the need to offer adequate time for the development and placement of official notices related to the Consolidated Planning process. In addition to utilizing the CPP to schedule and manage public meetings and public comment periods, TDA can make recommendations to expand the reach of official notices to include communities that may not typically engage in government planning processes.
- d) *Information Gathering Techniques.* The list below includes a list of qualitative and quantitative information gathering techniques to complete the Consolidated Planning process. Specifically, this task includes outreach efforts, both solicitation of community feedback and targeted interviews, to obtain perspectives of various interested parties. Members of our team will conduct focus group meetings to fully engage stakeholders and support a public meeting to gain public comment on the plan. The following traditional stakeholders in the City will be encouraged to participate:
 - i. Advocacy groups (i.e., affordable housing, persons with disabilities, social justice)



- ii. Faith-based organizations
- iii. Affordable housing developers operating in the study area
- iv. Banks and other financial institutions
- v. Educational institutions
- vi. Continuum of Care Board
- vii. Fair housing organizations
- viii. Neighborhood associations or groups/general public within the study area
- ix. Organizations and agencies that serve protected classes as well as low-income families
- x. Other stakeholder groups as identified by the City.

To address the particular challenges, TDA's engagement and outreach involves a range of suggested outreach methods:

- i. *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. TDA can suggest additional actions the City may take to attract the most diversity in perspectives to ensure its plans are comprehensive and effective.
- ii. *Community Needs 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 with assistance of City staff. All the raw data collected will be provided to the City along with a summary of the results with themes appropriately highlighted.



- iii. *Targeted Stakeholder Interviews.* To obtain additional detailed perspectives, TDA will conduct telephone interviews with various stakeholders identified by the City. Stakeholder interviews are intended to obtain “official positions” of various key constituencies such as planning officials, service providers, and advocacy groups.
- iv. *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 will also conduct and draft the Housing and Homeless Needs Assessment and Housing Market Analysis. The Plan will be developed using HUD’s 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 e-Con 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, additional mapping software may be utilized to create maps needed to supplement CPD Maps.



More information about individual sections of the plan follows:

- i. *Housing Market Analysis.* In consultation with the City, TDA will conduct a comprehensive housing market analysis that addresses housing availability, affordability, adequacy, and accessibility.
- ii. *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.
- iii. *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.
- iv. *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. ^(SEP)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.

- **Planned Approach in Creating the City’s Analysis of Impediments to Fair Housing Choice.**

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. 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:

- i. *PHASE 1 – 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.) The kickoff for the AI will be combined with the kickoff for the Consolidated Plan. During which, TDA will become acquainted with primary contacts and 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.
- ii. *PHASE 2 – 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.

- a. *Task A: Conduct Research and Data Analysis.* Immediately after the kickoff meeting, TDA will define fair housing issues by reviewing the current plan and collecting and then analyzing statistical data to create an updated profile of the housing situation in the region with appropriate coverage of the City service areas.

To update the profile, TDA reviews existing documents, including the jurisdiction's current Analysis of Impediments to Fair Housing Choice, and discusses outcomes from the current plan with City staff. 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. Any changes in these characteristics will be reviewed and assessed for impact on recommended actions in the plan.

In addition, TDA will update 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.

- b. Task B: Review and Assess City Laws and Other Conditions that Affect Fair Housing.* Once baseline 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, and 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 polices with the City and ensure that updated 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.

c. *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 and will combine this outreach with the outreach for the Consolidated Plan to create economies of scale. Our community outreach team is exceptionally well-positioned to carry out a meaningful community engagement process.

iii. *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.

a. *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. These recommendations will be used to create the updates to the AI.

b. 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.

iv. Public Participation and Public Consultation Meetings. 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. Outreach will be conducted in conjunction with the Consolidate Plan outreach and ensure coverage of issues relevant to the AI.

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, and other stakeholder groups as identified by the City.

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

- a. *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.
- b. *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.
- c. *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, if held in person, assist in advertising the community meetings and surveys, and follow-up with stakeholders to confirm attendance at focus groups, etc.



Examples of TDA Similar Completed Plans.

The table below includes a list of a list of similar services to those sought by this RFP that TDA has provided to other businesses or governmental entities. The projects of similar other states or other geographical large and diverse jurisdictions are identified with an asterisk:

Client Name	Description of Project
State of Minnesota	Consolidated Plan, Action Plan and Analysis of Impediments
Contra Costa County, CA	Consolidated Plan, Action Plan and Analysis of Impediments
State of South Carolina	Assessment of Fair Housing
Clayton County, GA	Assessment of Fair Housing
Charleston, SC	Consulting Services for AI to Fair Housing and Consolidated Plan
State of Michigan	Consulting for Fair Housing Impediments
Lake County, IL	Consolidated Plan
Richmond, CA	Consolidated Plan
Fall River, MA	Housing Market Study
State of Pennsylvania	Analysis of Impediments
Knox County	Consolidated Plan
Lubbock, TX	Consolidated Plan and Analysis of Impediments to Fair Housing
Tulsa, OK	Consolidated Plan and Analysis of Impediments to Fair Housing
Santa Monica, CA	Consolidated Plan
Alexandria, LA	Consolidated Plan and Analysis of Impediments to Fair Housing
Mount Vernon, NY	Consolidated Plan and Analysis of Impediments to Fair Housing
Santa Barbara County, CA	Consolidated Plan and Analysis of Impediments to Fair Housing
Shreveport, LA	Consolidated Plan
State of New Jersey	Consolidated Plan and Analysis of Impediments to Fair Housing
State of New Mexico	Consolidated Plan and Analysis of Impediments to Fair Housing
Merced, CA	Consolidated Plan and Analysis of Impediments to Fair Housing
Fargo, ND	Consolidated Plan and Analysis of Impediments to Fair Housing
Brownsville, Harlingen, and San Benito, TX	Consolidated Plan and Analysis of Impediments to Fair Housing
St. Louis, MO	Analysis of Impediments to Fair Housing
Clark County, NV	Analysis of Impediments to Fair Housing

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5. Description of City Participation

TDA anticipates 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. To that end, we work in cooperation with our clients to provide instruction while delivering comprehensive services. 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. The City's participation in the selection of priorities and goals and how the City will fund them is essential to creating a plan that is truly place-based and serves the community's unique needs.



6. Qualifications/Experience

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. Full resumes are attached.

- Jennifer Alpha, Executive in Charge, Primary Author/ Reviewer, Community Engagement (Phone: 202-669-8778; Email: jalpha@tdainc.org)
- Barron Bell –Assistance with Data Analysis/Mapping/IDIS e-Con Planning Suite entry and guidance
- Noah Woodward - Assistance with Data Analysis/Mapping/Report Writing/Community Engagement
- Alex Tester – Assistance with Data Analysis/Mapping/Report Writing/Community Engagement
- Administrative Support (TBD)

Jennifer Alpha, the Executive in Charge, is a Senior Consultant with over 20 years of experience in affordable housing and community development. She formerly worked 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

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

Baron Bell, TDA Consultant, is a federal housing and community development program regulations and policy expert. Mr. Bell is among a select group of professionals with expertise in the US Department of Housing and Urban Development (HUD) affordable housing and community development programs administered by the Office of Community Planning and Development (CPD). Mr. Bell specializes in entitlement grant programs, specifically, the Community Development Block Grant (CDBG), Home Investment Partnerships Program (HOME), Emergency Solutions Grant (ESG) and Housing Opportunities for Persons with HIV/AIDS (HOPWA). Mr. Bell is a nationally recognized expert on the Integrated Disbursement and Information System (IDIS) used by HUD grantees, and frequently trains staff and provides technical assistance on IDIS troubleshooting. Further, to assist federal program participants with compliance with Environmental Authorities, Mr. Bell conducts training nationwide on the requirements of NEPA. Mr. Bell holds a BA, Urban Studies, and graduate studies in Metropolitan Planning from University of Maryland.

Noah Woodward, Program Manager. Woodward leverages a background in data analysis, visualization, and technology to support program implementation and strategy. Noah managed a project team within the State of California's Emergency Rental Assistance Program. In this



position, he served as a lead coordinator between California's Department of Housing and Community Development and the Local Initiatives Support Corporation (LISC). He has also created data-driven solutions through roles in Major League Baseball with the Atlanta Braves and economic consulting. He graduated cum laude from Davidson College with a degree in Economics and has completed coursework in affordable housing finance and policy at Georgia State University's Andrew Young School of Public Policy.

Alexandra Tester, Senior Associate, Alexandra Tester has several years of experience working with underserved communities and advocacy organizations. Alexandra has participated in strategic program development to create more opportunities for youth and adults who face multiple systemic obstacles. Alexandra received her Bachelor of Arts degree at Gonzaga University where she double majored in Criminal Justice and Sociology.



7. Resumes

JENNIFER ALPHA SENIOR CONSULTANT, TDA

Professional Summary

Ms. Alpha has over 20 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.

Housing Analysis

- **TDA/ Consolidated Planning and Fair Housing Analysis**– Ms. Alpha has led TDA teams in the coordination and development of Consolidated Plans and Analyses of Impediments to Fair Housing for State, 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; review and analysis of fair housing complaints; development of priority needs to be addressed in the planning process and findings to illustrate fair housing concerns; and consultation with clients to develop recommendations and strategic goals that most effectively address needs 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 State 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

- TDA, Senior Consultant - 2011 to Present
- U.S. Government Accountability Office, Senior Analyst, Financial Markets & Community Investments – 2009 to 2011
- Reno & Cavanaugh, Associate – 2001 to 2006; Partner – 2006 to 2009
- Allegheny County Housing Authority, Researcher – 1999 to 2001
- Wilksburg Intra-Community Network, Consultant – 1999



**NOAH WOODWARD
PROJECT MANAGER, TDA**

Professional Summary

Mr. Woodward leverages a background in data analysis, visualization, and technology to support program implementation and strategy. Noah managed a project team within the State of California's Emergency Rental Assistance Program. In this position, he served as a lead coordinator between California's Department of Housing and Community Development and the Local Initiatives Support Corporation (LISC). He has also created data-driven solutions through roles in Major League Baseball and economic consulting. He graduated cum laude from Davidson College with a degree in Economics and has completed coursework in affordable housing finance and policy at Georgia State University's Andrew Young School of Public Policy.

Professional Experience

TDA Project Manager

- Oversee aspects of project management, including setting deadlines, assigning responsibilities, monitoring, and summarizing progress, overseeing budget and expenditures, ensuring quality control, and preparing reports regarding project status Served as Executive Director's representative in key external meetings and provided a written/verbal project management report to State officials at least twice per week.
- Gain a general understanding of the work being done across the project to provide appropriate oversight on tasks.
 - Undertake assessments, surveys, and discussions to identify barriers to program performance and provide recommendations for improvement, training, and/or technical assistance to address deficiencies.
- Identify opportunities for improvement in internal systems and processes, technology, and delivery mechanism, develop recommendations and lead implementations as assigned.
- Coordinate and manage the development of deliverables, such as reports (e.g., ensure deadlines are being met, provide quality assurance checks, coordinate with an editor, assist with basic writing support when needed), and presentations (e.g., lead development of content working with team, coordinate receiving feedback, update content)
- Coordinate and manage all project meetings with just the internal team and with the client, which includes scheduling meetings, developing agendas, working with the team to ensure they are ready for meetings, leading meetings, taking notes, sending notes out



to appropriate stakeholders, and following up on action items noted in meetings incorporating them into applicable documentation (e.g., work plan)

- Prepare written documents in response to training and technical assistance assignments including slide presentations, lectures, exercises, case studies, checklists, flowcharts, reports, guidebooks, policies, procedures, plans, and other materials.
- Deliver training and/or technical assistance as assigned.
- Assess marketing opportunities and target markets, gather intelligence on customers and competitors, generate leads for possible sales, follow-up on sales activity, and assist in writing proposals.
- Assure that timely information is provided for Quarterly Performance Reports to HUD

Local Initiatives Support Corporation

Program Officer, Data Analysis for CA Rent Relief Program

Served as Executive Director's representative in key external meetings and provided a written/verbal project management report to State officials at least twice per week.

- Led Data/Operations team in program implementation: developed a custom process that has connected over 30,000 California renter households with 120+ unique nonprofit partners providing 1-1 assistance.
- Designed and built a data warehouse solution, pipelines, and a web-based mapping platform to support local partners in identifying areas with high concentrations of households at risk of eviction.
- Managed relationships with 5 external vendors providing staffing support, eviction risk data, client relationship software, and scheduling software.

InnovateEDU, Brooklyn, NY

Data Coach and School Support Lead

- Managed user experience for early-stage nonprofit delivering critical data infrastructure to K-12 districts.
- Coordinated project management efforts between engineering team, clients, and philanthropic partners.
- Coached and supported 14 school district analysts, providing tools that enable program interventions.

Atlanta Braves, Atlanta, GA

Senior Manager, Major League Operations

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Manager, Major League Operations

- Managed 7 analysts and 5 seasonal interns; recruited, trained, and directed project workflow.
- Presented data-informed insight analyses (the distillation of complex insights in digestible visuals) to executives, players, and coaches to inform strategic operational decisions.
- Led the front-end and back-end product development of a departmental web application:
 - Collaborated daily with stakeholders to ensure seamless integration with existing workflow.
- Identified opportunity and led development of centralized platform to support five off-site affiliates:
 - Trained 25 on-site users to access, track, and leverage the platform to inform decisions.

Major League Operations Analyst

Served in an embedded liaison role between executive team and non-technical end users.

- Created \$24 million in data-driven insights for the organization via its first set of daily actionable reports.
- Persuaded stakeholders to incorporate novel gameplay strategies by presenting data visualizations.

Cornerstone Research, New York, NY Analyst

- Worked in small teams to brief expert witnesses and client law firms on economic litigation matters.
- Ran financial analyses on specific markets that traded over \$50+ trillion in assets and included the nation's largest investment banks.
- Presented written market analyses and assessments of client impact on large patent infringement case.

Technical Skills

Data Analysis: R, SQL, Python

Web Applications / Dynamic Visualizations in HTML, CSS, JavaScript

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Mapping in JavaScript (Mapbox JS) and graduate coursework in ArcGIS

Education

Andrew Young School of Public Policy, Georgia State University
Supplemental Graduate Work: Affordable Housing Policy, Affordable Housing Finance, Urban Theory

Davidson College, Davidson, NC

Bachelor of Arts, *cum laude*, Economics, Omicron Delta Epsilon Honors Society



BARON J. BELL
LEAD IDIS PROJECT CONSULTANT

PROFESSIONAL SUMMARY

Mr. Bell is a federal housing and community development program regulations and policy expert. Mr. Bell is among a select group of professionals with expertise in the US Department of Housing and Urban Development (HUD) affordable housing and community development programs administered by the Office of Community Planning and Development (CPD). Mr. Bell specializes in entitlement grant programs, specifically, the Community Development Block Grant (CDBG), Home Investment Partnerships Program (HOME), Emergency Solutions Grant (ESG) and Housing Opportunities for Persons with HIV/AIDS (HOPWA). Recipients of federal funds must comply with the National Environmental Policy Act (NEPA). To assist federal program participants with compliance with Environmental Authorities, Mr. Bell conducts training nationwide on the requirements of NEPA.

PROFESSIONAL EXPERIENCE

Partner, Community Development Experts, Rockville, MD (2004 – Present)

- Conducts training in IDIS and Consolidated Planning for HUD.
- Provides training and technical assistance to local governments administering federal housing and community development programs. Assistance provided in all phases of the grants management life-cycle process and in all areas of federal program rules and regulations as cited in the United States Code and Code of Federal Regulations.
- Provides consultant services to several HUD grantees, including City of Chicago, Atlantic City, City of Margate, FL, and District of Columbia.



Program Specialist, TONYA, INC., Washington, DC (1996 – 2003)

- Manager of HUD's National Consolidated Planning contract. Assisted in the preparation of Consolidated Plan/Annual Action Plan Checklist, designed training and developed course materials, and delivered training to over 500 participants nationwide.
- Specialized in IDIS and Consolidated Plan training. Trained countless participants nationwide and in federal territories in HUD's IDIS.
- Authored IDIS workshop exercises.
- Provided direct Technical Assistance to grantees.
- Served as Project Manager for New York City IDIS HOPWA data collection and input.
- Trained HUD Field Office Representatives with HUD's Grants Management Process Software (GMP), discussing both data input and Grants Management Process policy. Worked with system developers on software updates.
- Served as Systems Analyst on HUD's Departmental Grants Management System (DGMS) project. Worked with program developers in interpreting HUD business rules for various grant programs to develop Functional Requirements Documentation and Concept of Systems Operation.
- Conducted Consolidated Annual Performance and Evaluation Report (CAPER) workshops, instructing participants in the elements necessary for compliance with year-end reporting.
- Delivered courses in CDBG and HOME basics.

Projects Planner, Anne Arundel County (January 1994 – August 1996)

- Performed administrative oversight of CDBG and HOME activities including preparation of Grantee Performance Reports (GPR); Environmental Assessments; Contractor Activity Reports; Davis-Bacon Wage Rate



compliance; Uniform Relocation and Real Properties Acquisition Act compliance; and demographic analysis and thematic mapping for HUD's Consolidated Plan.

EDUCATION

B.A. Urban Studies (1991)

University of Maryland

Graduate Studies (1994)

Metropolitan Analysis & Planning

University of Maryland

HUD TRAINING and CERTIFICATIONS

HUD Executive Training Academy (1995)

IDIS HOME Trainer Certification



**ALEXANDRA TESTER
SENIOR ASSOCIATE, TDA**

Professional Summary

Alexandra Tester has several years of experience working with underserved communities and advocacy organizations. Alexandra has participated in strategic program development to create more opportunities for youth and adults who face multiple systemic obstacles. Alexandra received her Bachelor of Arts degree at Gonzaga University where she double majored in Criminal Justice and Sociology.

Experience

TDA Consulting (2021-Present)

Senior Associate

- Serve as primary community outreach coordinator to identified communities for CA's Emergency Rental Assistance Program. Help identify specific underserved communities and organizations serving at-risk populations.
- Cultivate new and existing partnerships with non-profit organizations, support grant managements and project oversight.
- Provide technical assistance to non-profits as it pertains to application assistance for rental relief.
- Provide communications materials and outreach to non-profits, government agencies, and key stakeholders.
- Help to oversee and add value to the overall housing relief experience by working with a team to identify challenges and opportunities.



Friends of the Children (April 2018-September 2021)

Professional Mentor

- Discovered, nurtured, and promoted 8 at-risk youth's individual strengths, talents and abilities by working in both one-on-one and group settings for 4 hours a week with each youth.
- Developed and implemented individualized road map goals for each youth and frequently assessed the personal needs of each youth and family served.
- Established individualized measurable goals and expectations in the areas of school success, pro-social development, improved health, making good choices and plans & skills for the future.
- Maintained professional and collaborative relationships with caregivers, community members, school personnel and fellow staff members.
- Completed monthly data entry and reporting.
- Recipient of the March 2020 *Mentor of the Quarter* award.

Navos (October 2015-March 2017; March 2019-October 2021)

Mental Health Technician

- Maintained a safe and hazard free environment by observing and documenting patient behavior, conducting patient room searches, reporting unsafe conditions, and applying appropriate emotional and physical support.
- Initiated and contributed to patient treatment planning, teaching and discharge planning.
- Participated in patient team care conferences by sharing observations of patient's progress toward identified goals and assisted the RN with the development, evaluation, and revisions of patient care plans.
- Implemented treatment plans which clearly identify the patient's voice, treatment strategies and specific outcome measures.



MENTOR Oregon (March 2017-April 2018)

Program Supervisor

- Supervised staff while overseeing the daily operation of 2 programs simultaneously, including implementation of individualized plans, advocacy, customer service and compliance.
- Wrote and implemented individualized support plans for 54 individuals.
- Maintained professional relationships with program individuals, families, residential providers, and case managers.
- Lead ongoing training concerning individuals served, policies & procedures and physical environment.
- Assured safety of individuals' funds by monitoring spending and reconciling financial accounts monthly.

Education

Gonzaga University

Dual Degree

- Bachelor of Arts, Criminal Justice & Sociology



8. References

1. Company Name: City of Lubbock

Contact Name: Karen Murfee
 Address: P.O. Box 2000, Lubbock, TX 79457
 Email: KMurfee@mail.ci.lubbock.tx.us
 Phone Number: (806) 775-2282

City of Lubbock, TX 2019-2023 Consolidated Plan, Annual Action Plan, and AFH

In 2019-2020, TDA prepared a Consolidated Plan for Lubbock, TX using HUD's e-Con Planning Suite. The Consolidated Plan developed for Lubbock was a comprehensive document that described the City's housing market conditions in a rapidly growing city and identified needs for affordable housing and community development. Input from internal and external stakeholders was a key aspect of this process. TDA also prepared the City's AFH. This work was led by Jennifer Alpha, the Executive-in-Charge.

2. Company Name: City of Tulsa

Contact Name: Judy Gillaspie
 Address: 175 E. 2nd St., Suite 1560, Tulsa, OK 74103
 Email: JGillaspie@cityoftulsa.org
 Phone Number: 918-596-9083

City of Tulsa, OK 2020-2024 Consolidated Plan, Annual Action Plan, and AI

In 2019-2020, TDA prepared a Consolidated Plan for Tulsa, OK using HUD's e-Con Planning Suite. The Consolidated Plan developed for Tulsa was a comprehensive document that described 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. The resulting Consolidated Plan provided a unified vision for community development and housing actions with the primary goals of providing affordable housing,



support for vulnerable populations, and neighborhood revitalization. TDA also engaged in an intensive community outreach effort that met residents where they were in their communities. TDA also prepared the City's AI. This work was led by Jennifer Alpha, the Executive-in-Charge for the proposed engagement with the State of Minnesota.

3. Company Name: Lake County, IL

Contact Name: Jodi Gingiss
Address: 500 W Winchester Road, Unit 101 Libertyville, IL 60048
Email: jgingiss@lakecountyil.gov
Phone Number: (847) 377-2139

Lake County, IL Consolidated Plan 2015 -2019 & Action Plan

In 2014-2015, TDA prepared a Consolidated Plan for Lake County, IL (outside Chicago, IL). 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. This work was led by Jennifer Alpha, the Executive-in-Charge.

9. Sample Copies of Con Plan/AI

The following projects are samples of a few of the Consolidated Plans and Annual Action Plans TDA has complete in recent years:

- **Client/Project: *State of New Jersey Consolidated Plan 2020-2024, Annual Action Plan 2020 and 2021, and Analysis of Impediments to Fair Housing 2020***

Description of services: In 2019-2020, TDA prepared a Consolidated Plan and Analysis of Impediments to Fair Housing for the State of New Jersey. The Consolidated Plan

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developed for the State covered the administration of HOME, CDBG, ESG, HOPWA, and HTF funds. TDA worked to develop strategies to address needs throughout the state, including new efforts and continuation and strengthening of existing efforts that could be carried on. TDA also prepared the State's second year annual action plan for 2021.

State Link to Plan:

<https://www.nj.gov/dca/divisions/dhcr/announcements/pdf/Final%20Draft%202020%20-%202024%20Consolidated%20Plan%20.pdf>

- **Client/Project: *City of Tulsa, OK 2020-2024 Consolidated Plan, Annual Action Plan, and AI***

Description of services: In 2019-2020, TDA prepared a Consolidated Plan for Tulsa, OK using HUD's e-Con Planning Suite. The Consolidated Plan developed for Tulsa was a comprehensive document that described 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. The resulting Consolidated Plan provided a unified vision for community development and housing actions with the primary goals of providing affordable housing, support for vulnerable populations, and neighborhood revitalization. TDA also prepared the City's AI.

City Link to Plan:

Consolidated Plan: https://www.cityoftulsa.org/media/13633/2020-2024-consolidated-plan_final.pdf

- **Client/Project: *City of Lubbock, TX 2019-2023 Consolidated Plan, Annual Action Plan, and AFH***

Description of services: In 2019-2020, TDA prepared a Consolidated Plan for Lubbock, TX using HUD's e-Con Planning Suite. The Consolidated Plan developed for Lubbock was a



comprehensive document that described the City's housing market conditions in a rapidly growing City and identified needs for affordable housing and community development. TDA worked with the City to develop strategies to address those needs. TDA also prepared the City's AFH.

City Link to Plan:

<https://ci.lubbock.tx.us/storage/images/dEDVdMAKeOrfObValilHHc3dGHR9jtSJ17YvCJz9.pdf>

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

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.

County Link to Plan: <https://www.lakecountyil.gov/DocumentCenter/View/2395/2015---2019-Housing-and-Community-Development-Consolidated-Plan-PDF?bidId=>



10. Work Plan

Project Milestone	Timeline
Contract Signed	August 30 2023
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 Plans Determination of Source Documentation Preparation of Demographic Profiles for both Plans	September 2023
Completion of Required Consultation, Community Needs Assessment, Forums, and Survey Consolidated Needs Assessment and Consultation Summaries First Draft of Consolidated Plan and Annual Action Plan for Public Comment First Draft AI	February 1 2024
30-day Public Review Period for Consolidated Plan	March 2024
Final Draft of Consolidated Plan, Annual Action Plan to respond to comments & Final Draft of AI	April 2024
Final Consolidated Plan submitted to HUD via eCon Planning Suite and final AI delivered	May 1 2024



11. Fixed Price Budget

TDA proposes an all-inclusive fee for all deliverables:

\$56,646.00 – Fifty-Six Thousand Six Hundred Forty-Six Dollars and no Cents.

The component parts:

Con Plan	\$42,485.00
Annual Action Plan	2,832.00
Analysis of Impediments	<u>11,329.00</u>
Total	\$56,646.00

EXHIBIT "B"

SPECIAL REQUIREMENTS

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EXHIBIT "C"

SCHEDULE OF COMPENSATION

City agrees to compensate Consultant for the services outlined in Exhibit "a" not to exceed the contract sum of \$56,646.00. The following rates shall include all expenses incurred by Consultant in the performance of the required services. Consultant shall be paid within thirty (30) days after City's receipt by the City Manager and shall include details as to the number of hours worked and the services performed. Consultant shall be paid for actual hours utilized on the project.