

COUNCIL BLUFFS, IA

PROPOSAL:
CD 2022-18 RFP FOR A HOUSING PLAN AND AN UPDATE TO THE CONSOLIDATED PLAN, ACTION PLAN AND AFFIRMATIVELY FURTHERING FAIR HOUSING FOR THE CITY OF COUNCIL BLUFFS

November 14, 2022

Prepared by:

Civitas, LLC
600 Salty Alley
Mount Pleasant, SC 29464

CIVITAS
COMMUNITY DEVELOPMENT

www.civitassc.com

TABLE OF CONTENTS

03 Executive Summary

04 Firm Overview & Past Performance

08 Schedule

09 Budget

10 Team Personnel

17 Scope of Services

EXECUTIVE SUMMARY

Civitas is pleased to present this proposal for professional services for technical assistance related to the preparation of City of Council Bluffs 2024-2028 Consolidated Plan and 2024 Annual Action Plan, Affirmatively Furthering Fair Housing Update (via an Analysis of Impediments to Fair Housing Choice), and a Housing Needs Assessment and Housing Plan. Our team will provide unmatched knowledge of the Consolidated Planning process combined with unsurpassed fair housing expertise to deliver timely and comprehensive services. Our proprietary methodology has been refined through the successful completion and submission of well over one-hundred HUD-approved Consolidated Plans (ConPlans), Annual Action Plans (AAP) and Analysis of Impediments to Fair Housing Choice reports (AIs). We have also prepared several housing market studies and balanced housing plans. We have worked with grantees of all sizes and we are experts in the CDBG and HOME programs and services. Our knowledge of both the programing side as well as the reporting requirements puts our team in a unique position to provide a high quality and truly useful Consolidated Plan which will help guide the City's community development programing over the next five years. We will coordinate with City staff on a regular basis via phone, email, or virtual conference calls to ensure we incorporate the staff's local knowledge and insights within all aspects of the required deliverables.

There is a large overlap between the data points and analysis for the ConPlan, AI, and Housing Needs Assessment (HNA). We will take advantage of this overlap in by combining our efforts when feasible during our data research, G.I.S. mapping, policy analysis, public and stakeholder outreach, and plan development. This will ensure continuity and save on costs while still addressing each deliverables unique requirements.

Our organization is based out of Charleston, SC and we have a long history working successfully with cities and counties across the nation. We are well-suited to provide consulting services and technical assistance in all aspects of affordable housing. We specialize in HUD grant program development and compliance, and we have successfully completed ConPlans, Action Plans, AIs, Environmental Reviews, IDIS training, and general housing related technical assistance for numerous clients throughout the country including Columbia, SC; Jacksonville, FL; Hudson County, NJ; Harrisburg, PA; Colorado Springs, CO; and many more. Our consultants also serve as HUD technical assistance providers and train grantees across the nation.

Please find below our proposal for completing the scope of services identified in the RFP. These services and associated costs are based on our understanding of the City's needs; however, we are always happy to negotiate and adjust at your request. Civitas will also prepare a complimentary update to the Citizen Participation Plan for the City. This signed letter serves to bind our organization to what is included in this proposal for sixty (60) days. Principal Owner and Lead Consultant Erich Chatham will serve as the primary contact, and he will share Project Manager roles for this project Spencer Christian. We look forward to working with City of Council Bluffs to help provide decent, safe, and affordable housing to your residents.

Sincerely,

Karl Erich Chatham

Erich Chatham
Civitas, LLC
(843) 573-7825

CIVITAS
COMMUNITY DEVELOPMENT

FIRM OVERVIEW

CIVITAS, LLC

Firm Information
600 Salty Alley
Mount Pleasant, SC 29464
Phone: 843-573-7825

Experience
60 Years of combined community development and HUD experience

Firm Size
8 Full-time Employees

Firm Structure
Limited Liability Company

Year Founded
2009

Federal TAX ID Number
80-0443389

UEI Number
MNU1A73ZJNX5

Services
HUD Grant Technical Assistance
Consolidated Plans
Annual Action Plans
Fair Housing Analyses
Environmental Reviews
IDIS Training
Community Needs Assessments
Housing/Market Studies

Mission and History

Civitas, LLC is a research and community development consulting firm specializing in HUD Grant technical assistance. We are in the business of thinking and doing. We help state & local governments, non-profit, and for-profit enterprises solve problems and implement solutions. Our knowledge and experience with HUD programs, grant compliance, social science research, economic development, environmental reviews, and community revitalization put us in a unique position to assist a consortium of public and private entities in better meeting their missions.

We bring a passion for public service to our work in areas such as affordable housing development, grant writing & administration, program evaluation, research design & implementation, social & economic impact analysis, survey research, GIS mapping/spatial analysis, regulatory compliance, and project management.

We have written hundreds of HUD Consolidated Plans, Annual Action Plans, Consolidated Annual Performance Reports, dozens of market research and community needs assessments. We are highly proficient in HUD program design, implementation, and compliance.

Civitas has also worked with numerous clients to provide technical assistance, training, and program compliance review. Our HUD grant experience is highly sought after and nationally recognized.

Civitas was founded in 2009 by Jimmy Ardis and Erich Chatham, two graduates of the College of Charleston's Masters of Public Administration program. Civitas has a 13-year long history of successful work performance with clients across the country. Erich Chatham is now the principal owner and his dedication and hard work developed Civitas into one of the foremost housing policy firms in the country, particularly with regard to HUD programs.

PAST PERFORMANCE

Overview

Civitas, LLC has a 13-year long history of successful work performance with clients across the country. Our senior consultants bring over 60 years of combined housing and HUD program experience to the table. Many of our growing client list start out with just one initial contract for a single project, for example a Consolidated Plan or Analysis of Impediments to Fair Housing Choice or HUD technical Assistance. All of these projects are completed in a timely fashion per the deadline given by HUD or the jurisdictional deadlines. We have never missed a firm deadline. Over the years, the demand for our technical assistance beyond single scope projects has grown. Our technical assistance has allowed jurisdictions across the country to improve their processes and management of HUD funded programs.

We are proficient in the review, updating, or writing policy and procedures for Environmental Reviews, Davis Bacon, Section 3, Citizen Participation Plans, Lead Based Paint, etc. We have ample experience in providing best practices and program design suggestions for all HUD housing programs, economic development, homeless solutions, public services, CHDOs, Neighborhood Revitalization Strategy Plan, etc. Our team has assisted with affordable housing program developments, economic development programs, environmental reviews, policy reviews and updates. We have also been a crucial component to helping remove HUD findings for several municipalities. We are staffed to provide policy and procedure review or creation, as well as specific program technical assistance and best practices advice. The below client list details projects led by Civitas as well as technical assistance clients that match the tasking deliverables. We are happy to provide more if requested.

Samples

More projects and reports are linked on our website: http://civitassc.com/projects.

Berkeley County, SC 2021 Consolidated Plan
https://tinyurl.com/BerkeleyCountyConPlan

Hudson County, NJ 2020 Consolidated Plan
https://tinyurl.com/Hudson-ConPlan-2020

Florence, SC 2021 Analysis of Impediments
https://tinyurl.com/Florence-AI-2021

Hialeah, FL 2020 Analysis of Impediments
https://tinyurl.com/Hialeah-AI

Commerce City Housing Needs Assessment (2018) & Balanced Housing Plan (2019)
http://civitassc.com/s/2018-C3-HNA-FINAL.pdf

PAST PERFORMANCE

References

Client: Jacksonville-Duval County, Florida
Period of Performance: September 2017 – Current
Project(s): 2018 Consolidated Plan Substantial Amendment, CAPERs & Annual Action Plans, Neighborhood Strategic Counseling Services, Disaster Relief Program Consulting, HUD-program management, Environmental Reviews and related training, development of CDBG, HOME, ESG and HOPWA policy and procedure manuals, 2020 5-Year ConPlan and AAP, 2020 Analysis of Impediments, CARES Act amendment TA, Treasury ERAP1 and ERAP2 program administration, HOME-ARP Allocation Plan
Project Leads: Erich Chatham, Spencer Christian
Point of Contact: Tom Daly, Director of Neighborhoods Department
TDaly@coj.net | (904) 255-8204

Client: Spartanburg County, SC
Period of Performance: Fall 2018 – current
Project(s): 2019-2023 Consolidated Plan and 2019 Annual Action Plan; HUD program Technical Assistance, IDIS training, multiple AAPs/CAPERs, HOME-ARP Allocation Plan
Project Leads: Erich Chatham, Grace Orr
Point of Contact: Kathy Rivers, Director of Community Development
krivers@spartanburgcounty.org | (864) 595-5300

Client: Broward County, Florida
Period of Performance: October 2015 – December 2015 & November 2017 – current
Project(s): 2020-2024 5-Year Consolidated Plan for HOME Consortium, IDIS Training, Technical Assistance, 2020 Analysis of Impediments to Fair Housing Choice, IDIS Training
Project Lead: Erich Chatham
Point of Contact: Yvette Lopez, Manager Environmental Protection & Growth Management YLOPEZ@broward.org | (954) 357-4930

PAST PERFORMANCE

Clients (Abbreviated)

ONGOING HUD TECHNICAL ASSISTANCE

Anderson, SC
Horry County, SC
Lauderhill, FL
N. Miami, FL
Miami Gardens, FL
Hialeah, FL
Broward County, FL
Jersey City, NJ
Harrisburg, PA
Bristol Township, PA
Jacksonville, FL
Columbia, SC
Spartanburg County, SC
Greenville, NC
Meriden, CT
Hudson County, NJ
Commerce City, CO
Bridgeport, CT
Homes of Hope, Inc
St. Cloud, FL
Colorado Springs, CO
Meriden, CT
Reno, NV
Castle Rock, CO
Thornton, CO
Adams County, CO
Lubbock, TX
Lowcountry COG, SC
Tamarac, FL
Sunrise, FL
Berkeley, SC

ANALYSIS OF IMPEDIMENTS

Horry County (Consortium), SC
Spartanburg, SC
Lexington County, SC
Columbia, SC
Greenville, NC
Hialeah, FL
St. George, UT
Charleston, SC
Lower Savannah COG, SC
Bristol Township, PA
Colorado Springs, CO
Jersey City, NJ
Burlington, NC
Concord HOME Consortium, NC
Sherman, TX
Hudson, County, NJ
Meriden, CT
Jacksonville, FL
Broward County HOME Consortium, FL
Florence, SC

ANNUAL ACTION PLANS & CAPERS

Horry County Consortium, SC
Spartanburg County, SC
City of Spartanburg, SC
Jacksonville, FL
Miami Gardens, FL
Bristol Township, PA
St. George, UT
Colorado Springs, CO
Hialeah, FL
Greenville, NC
Marin County, CA
Columbia, SC
Harrisburg, PA
Orangeburg, PA
Collier County, FL
Hudson County, NJ
Jersey City, NJ
Meriden, CT
Summerville, SC
Reno, NV
Broward County HOME Consortium, FL
Commerce City, CO
Stamford, CT
Hialeah, FL
Miami Gardens, FL
Benton Harbor, MI
Castle Rock, CO
Fort Pierce, FL
Sunrise, FL
Stratford, CT
Lubbock, TX

ENVIRONMENTAL REVIEWS

Horry County, SC
Broward County, FL
Collier County, FL
Town of Davie, FL
Hialeah, FL
City of Anderson, SC
Miami Gardens, FL
Lexington County, SC
Lauderhill, FL
Port Arthur, TX
Harrisburg, PA
Bridgeport, CT
City of Jacksonville, FL
City of Greenville, NC

CONPLANS

Horry County Consortium, SC
Spartanburg County, SC
City of Spartanburg, SC
Jacksonville, FL
Miami Gardens, FL
Bristol Township, PA
St. George, UT
Colorado Springs, CO
Hialeah, FL
Greenville, NC
Marin County, CA
Columbia, SC
Harrisburg, PA
Orangeburg, PA
Collier County, FL
Hudson County, NJ
Jersey City, NJ
Meriden, CT
Summerville, SC
Reno, NV
Broward County HOME Consortium, FL
Commerce City, CO
Stamford, CT
Hialeah, FL
Miami Gardens, FL
Benton Harbor, MI
Castle Rock, CO
Fort Pierce, FL
Sunrise, FL
Stratford, CT
Lubbock, TX

HOUSING MARKET ASSESSMENTS

Homes of Hope - Greenville, SC
City of Spartanburg, SC
Grand Strand Housing - SC
Horry County, SC
Seewee Community, Charleston, SC
Jacksonville, FL
Adams County, CO
Commerce City, CO

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SCHEDULE

The following tentative timelines are for associated deliverables and can be adjusted to meet the needs of City, as requested.

CONPLAN

- **Project Kick Off Meeting**: As soon as possible after project award
- **Data Collection**: January 2023
- **Mapping Development**: January 2023
- **Public Surveys Open**: January - February 2023
- **Community and Stakeholder Meetings**: TBD
- **Draft NA & MA Sections of ConPlan**: Jul 10, 2023
- **Draft Strategic Plan & Action Plan Submitted to City**: Week of Aug 13, 2023
- **ConPlan FULL Public Comment Draft**: Sep 15, 2023
- **Public Comment Period**: TBD (~Oct 1, 2023 – Oct 30, 2023)
- **Public Hearing (City to conduct):** TBD
- **Upload to IDIS**: November 13, 2023
- **Final Draft Submitted to HUD**: NLT November 15, 2023

AI

- **Data Collection: January 2023**
- **Mapping Development: January 2023**
- **Public Surveys Open: January - February 2023**
- **Community and Stakeholder Meetings**: TBD
- **Community Profile Analysis and HMDA analysis**: May 2023
- **Impediments and Fair Housing Plan Development**: June 2023
- **Final AI including Fair Housing Action Plan**: August 31, 2023

HNA AND HOUSING PLAN

- **Data Collection: January 2023**
- **Mapping Development: January 2023**
- **Public Surveys Open: January - February 2023**
- **Community and Stakeholder Meetings**: TBD
- **Policy Analysis and local resources analysis**: April 2023
- **Current Housing Needs/Future Housing Needs**: May 2023
- **Housing Goals**: June 2023
- **Housing Plan Implementation**: Jul 15, 2023
- **Final HNA**: August 31, 2023

BUDGET

Cost Summary

Civitas proposes to provide all the services detailed in this submitted proposal for sum of $133,550 prior to any printing costs. We are happy to negotiate to lower the price by consolidating efforts (further combining AFFH and HNA) or reducing travel costs during public outreach (incorporating more virtual meetings with stakeholders). The price shall remain valid for 60 days after the opening of proposals.

Task	Fee
Task 1: Project Management & Administration	
Ongoing Coordination	N/A
Subtotal	*$0*
Task 2: Housing Analysis	
Data Research	$8,100
Mapping	$2,700
Housing Needs Assesment	$4,500
Subtotal	*$15,300*
Task 3: Public Outreach & Presentations	
Technical Advisory Committee	$10,000
Community Stakeholder Committee	$15,000
Public Meetings	$30,000
Subtotal	*$55,000*
Task 4: Develop the Housing Plan	
Goals	$3,750
Implementation Strategy	$4,500
Subtotal	*$8,250*
Task 5: Consolidated Plan and Annual Action Plan Updates	
Needs Assessment and Market Analysis	$18,000
Strategic Plan	$10,000
Annual Action Plan	$5,000
Subtotal	*$33,000*
Task 6: Affirmatively Furthering Fair Housing Update	
Community Profile	$3,000
Barriers to Fair Housing	$4,500
Fair Housing Action Plan	$4,500
Subtotal	*$12,000*
Task 7: Documentation	
Council Bluffs Housing Plan	$10,000
Subtotal	*$10,000*
TOTAL	***$133,550***



Erich Chatham

Owner / Lead Consultant

404-408-1256 | erich.chatham@civitassc.com

Education

MA of Public Administration
The College of Charleston
Charleston, SC, 2008

BA in Arts in History
Oglethorpe University
Atlanta, GA, 2002

Core Expertise

- Market Analysis
- Housing Policy
- Strategic Plan
- Network Collaboration
- Public Presentations
- Underwriting
- Fair Housing
- Consolidated Plans
- Annual Action Plans

Certifications

- HUD national technical assistance provider
- HOME Certified Specialist
- IDIS Trainer
- eCon Planning Suite Trainer

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Bio

Erich has thirteen years of professional housing and community development research and analysis experience. As Lead Consultant and Project Manager, Erich has worked on economic and community development projects with local governments, for-profits, and non-profits throughout the nation. He serves as a national technical assistance provider for the US Department of Housing and Urban Development and is a HOME Certified Specialist. Erich has delivered a hands on approach to housing needs assessments and housing strategic planning throughout the country. His expertise in housing policy, homeless solutions, economic development, and community enhancement have been recognized nationally.

Erich serves on numerous non-profit boards of directors including the Palmetto Community Land Trust, Grand Strand Housing and Community Development, the South Carolina Interagency Council on Homelessness and the Lowcountry Continuum of Care where he serves as the Chairman of the Governing Council.

Work Experience

Civitas, LLC
Principal Owner & Lead Consultant
Mt Pleasant, SC, May 2008 – Current

Urban Land Institute
Graduate Intern
Charleston SC, Jan – Apr 2008

College of Charleston
Graduate Assistant
Charleston, SC, Nov 2006 – Dec 2007

Our Lady of Mercy Catholic High School
Teacher, Dept Chair, Head Coach
Fairburn, GA,May 2002 – Jun 2006

Memberships and Professional Training

- Board of Directors, South Carolina Coalition for the Homeless
- Board of Directors, Coastal Carolina Community Development Corp
- Board of Directors, Grand Strand Housing & CDC
- HUD - HOME Program Certified Specialist: Rules & Regulations
- HUD – IDIS, DRGR & eCon Planning Suite Trainer



Spencer Christian
Director of Operations
spencer.christian@civitassc.com

Education

MS of International Affairs
The Georgia Institute of Technology
Atlanta, GA 2006

BA in French
Georgia College & State University
Milledgeville, GA 2003

Core Expertise

- Project Management
- Public Outreach
- Housing Policy
- Fair Housing
- Analysis of Fair Housing Choice
- Environmental Reviews
- G.I.S. Mapping

Special Projects

- PHA HCV Video Training Series
- HOME-ARP Allocation Plans
- Local HUD Training Resources

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Bio

Spencer transitioned to housing and community development consulting after serving 10+ years in the United States Navy as an intelligence officer. He serves as the Civitas Director of Operations, ensuring project quality control, communications, and timeliness. He also heads up the firm's special projects. Having spent time in cities and military bases throughout the US, Middle East, and Asia, he brings a unique, multinational perspective to housing and development. He delivers value and insight to urban development projects by leveraging his military background in analysis, policy review, financial oversight, and project management. Spencer has a keen interest in affordable and fair housing as well as supporting urban sustainability technology and culture. He maintains oversight on all projects to ensure transparency, timeliness, and quality. Further, he provides grants management compliance and reporting including policies and procedures development for all Civitas projects.

Work Experience

Civitas, LLC
Director of Operations
Wahiawa, HI, Jan 2019 – Current

United States Navy
Intelligence Officer / Director of Operations
Worldwide, Jun 2008 – Mar 2019

Georgia Tech Center of G.I.S.
Graduate Assistant - G.I.S. Technician
Atlanta, GA, Jun 2005 – Jan 2007

Newton High School
Teacher, Head Coach
Covington, GA, May 2003 – Jun 2005

Qualifications Summary and Professional Training

Spencer's military background demanded attention to detail in all daily tasks. His positions required he master the ability to review, conceptualize, and enact legal policy compliance and best practices in conducting intelligence operations. These skills combined with his trend analysis and project management experience transferred seamlessly to allow an immediate impact to Civitas and its clients.



Peter Neiger
Lead Market Analyst & GIS Technician

pete.neiger@civitassc.com

Education

BS in Economics
The College of Charleston
Charleston, SC, 2009

Core Expertise

- Housing Needs Assessment
- Market Analysis
- Data Visualization
- Housing Policy
- Fair Housing
- Consolidated Plans
- Analysis of Fair Housing Choice
- G.I.S. Mapping
- Environmental Reviews

Local PJ Training

- HUD ER Process
- HEROS

Bio

Peter has thirteen years of professional experience in economic analysis, with eight years specializing in housing policy issues and environmental reviews. He serves as Civitas the primary data analyst for Housing Needs Assessments, housing Plans, Strategic Homeless Plans, Analyses of Impediments, and Market Analyses. He has completed over 60 housing needs and market analyses for a variety of small city, large metropolitan, county, and state-level clients. His keen insight and methodical approaches to quantitative housing, demographic and economic trends has provided valuable insights that underscore current gaps and future needs that can direct policy and resource. allocation for decisions. He also leads Civitas GIS department and applies data visualization tools to allow for easily understood information to complex scenarios.

Peter currently serves on the Board of Directors for the Cape Fear Community Land Trust and is passionate about helping communities develop affordable sustainable housing.

Work Experience

Civitas, LLC
Lead Analysis / Environmental Review Coordinator
Wilmington, NC, Nov 2014 – Current

Thomas Dale and Associates
Security Operations Manager
Los Angeles, CA , Aug 2012 – Nov 2013

Students For Liberty
Internal Operations Manager
Washington DC, May 2010 – May 2012

United States Army
Team Leader (E-5), Infantry Paratrooper, 82nd Airborne Division
Various Locations, Nov 2001 – Nov 2005

Memberships and Professional Training

- Board of Directors, Cape Fear Community Housing Trust
- HUD Environmental Review Training Program
- HEROs Training Program

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Kyle Jenkins

Consultant - CoC and Homeless Expert

kyle.jenkins@civitassc.com

Education

Associates of Art in Gen Education
Wor-Wic Community College
Salisbury, MD 2010

Core Expertise

- Homeless Solutions
- ESG Program
- CDBG Program
- HMIS
- CoC Administration
- CDBG Program
- ConPlans
- Data Research
- Analysis of Fair Housing Choice

Local Training

- CoC Process
- ESG Training

Bio

Kyle is an associate consultant and our team's lead as an ESG grant specialist. He has over seven years of experience of developing and administering homeless housing programs, homeless services and homeless database management/ reporting. Kyle has director level experience with managing nonprofit organizations, projects and initiatives, while delivering mission-critical results at all levels including program development, budgeting, administration, strategic planning, reporting and evaluation, and developing/ maintaining strategic partnerships and relationships with government agencies and community partners. Kyle brings expertise in HMIS administration, HUD data standards, confidentiality, data quality and improvement programs and system reporting. He is proficient with Wellsky's (previously Mediware), ServicePoint HMIS software and is also familiar with Charity Tracker's HMIS software.

Work Experience

Civitas, LLC
Lead ESG Specialist
Myrtle Beach, SC Feb 2021 – Current

Eastern Carolina Housing Organization
Chief Operating Officer / HMIS Admin
Myrtle Beach, SC, 2014 – 2021

Memberships and Professional Training

- Chair State HMIS Committee, (SCICH) South Carolina Interagency Council for the Homeless
- Assistant Secretary, (TCHC) Total Care for the Homeless Coalition (CoC)
- Motivational Interviewing
- Francis Marion University Non Profit Leadership Institute
- Mental Health First Aid Certification

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Richard Caplan

Economic Development Analyst
richcaplan@aol.com

Education

Masters in Public Policy
University of California, Berkeley
Berkeley, CA

BA in Political Science
University of California, Berkeley
Berkeley, CA

Core Expertise

- Housing Policy
- Economic Development
- Strategic Planning
- Public Policy Review
- Policy Recommendation
- In-fill Housing Analysis
- Data Research
- Analysis of Fair Housing Choice
- City Management

Bio

Rich has delivered housing consulting services in more than 20 states, providing a unique understanding of the range of local policy practices that have been successful especially in addressing workforce and low-income housing in urban areas and cities with higher median household incomes who routinely face the need to maintain a diversified workforce. He has prepared more than 20 housing elements for city comprehensive plans in the western U.S. and range of innovative housing financing strategies for low-income and in-fill housing for cities and not-for-profit housing development corporations. Rich delivered housing policy recommendations to accommodate workforce and other affordable housing to serve targeted underserved populations and completed economic impact studies for housing and mixed-use developments. He has also analyzed impact on housing from zoning code changes including lot size reductions, reduction in parking requirements, modifying setbacks and accessory dwelling units. Furthermore, Rich prepared housing market studies for developers for cities ranging in size from 2,500 to over one million in population and conducted economic impact studies for alternative land uses and modification to vehicle and bicycle lane transportation patterns; and evaluated existing and recommended policy changes to housing strategies that consider redevelopment, displacement, and changes in land use and transportation patterns.

Work Experience

Richard Caplan & Associates
Owner, Principal
Greenville, SC, 1993-2010; 2016 – Current

Parsons, Pasadena, California
Manager, Economic Planning Department
City of Yanbu, Saudi Arabia, 2010 - 2016

Town of Vail, Colorado
City Manager
Vail, CO, 5 years

Memberships and Professional Training

- Board of Directors, Heartland Business Capital



Vern Xiong
IDIS Technician/Data Specialist

vern.xiong@civitassc.com

Education

Bachelor of Arts in Art Studies
Greenville University
Greenville, IL 1999

Grant Proposal Writing Certificate
Fort Hays State University
Hays, KS, 2012

Core Expertise

- IDIS
- Consolidated Plans
- Strategic Plans
- Annual Action Plans
- Data Research
- Analysis of Fair Housing Choice
- G.I.S. Mapping
- Grant Writing

Bio

Vern has worked with Civitas for eight years as a research assistant and data collection expert. He serves as the team's IDIS specialist, combining his experience and technical proficiency to all ConPlans, AAP, and CAPERs. His experience spans housing studies, Strategic Plans, Annual Action Plans, and CAPERs across the country including dozens of jurisdictions in South Carolina, Florida, Colorado, Connecticut, New Jersey, and many others. In addition to his work with Civitas, he has worked on research and evaluation for non-profits in Minnesota and Colorado, as well as international development projects in Southeast Asia and Central America.

Coming from a refugee family, Vern has a special interest in helping displaced people and secondary migrants adapt, make healthy living choices, and grow with their new communities. Before working at Civitas, Vern managed Lao Family's Youth and Family program for seven years. He also helped lead many community development programs, including CDBG, in Minneapolis-St. Paul.

Work Experience

Civitas, LLC
Lead IDIS Technician / Research & Data Lead
St. Paul, MN, May 2014 – Current

Lao Family Community of Minnesota
Youth and Family Program Manager
St. Paul, MN, Apr 2002 – Dec 2012

One Source Supply, Inc.
E-Commerce Coordinator
Warrenville, IL Mar 2001 – Mar 2002

Memberships and Professional Training

- Board of Directors, Overseas Tribal Services Minnesota Chapter
- Board of Directors, Star Lake Wilderness Camp (2001-2005)

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Maggie Blake
Consultant - CDBG & ESG Specialist

maggie.blake@civitassc.com

Education

Master of Education
University of Notre Dame
Notre Dame, IN 2019

B.A. in History and Poverty Studies
University of Notre Dame
Notre Dame, IN 2017

Core Expertise

- CDBG Program
- HOME Program
- Grant Writing
- Neighborhood Stabilization Program
- Consolidated Plans
- Annual Action Plans
- CAPERs
- Data Research

Special Projects

- PHA HCV Video Training Series
- City of Jacksonville HUD Training Video series

Bio

Maggie recently joined Civitas, bringing professional experience in homeless services, grant-writing, non-profit operations, and development. Maggie completed a two-year teaching service program while earning a Mater's degree in Education from the University of Notre Dame. She transitioned to homeless services, working for the Pope Francis Center in the heart of downtown Detroit. Her work in homeless services gave her well-rounded expertise in non-profit operations and federal grant management. Maggie's work with Civitas includes CDBG, HOME, and ESG program technical assistance and client interface. She regularly assists clients with the completion of HUD Annual Action Plans, CAPERs, IDIS technical assistance, and stakeholder outreach.

Work Experience

Civitas, LLC
Consultant / CDBG & HOME Specialist
Charleston, SC, Apr 2021 – Current

Pope Francis Center
Development Coordinator and Grant Writer
Detroit, MI, 2020 - 2021

St. Francis International School
Teacher, Student Council Moderator
Silver Spring, MD, 2017 – 2020

Memberships and Professional Training

- Indiana Secondary Education Teaching Certificate (Social Studies)

CIVITAS
COMMUNITY DEVELOPMENT

SCOPE OF SERVICES

Project Approach Overview

Technical Area

Civitas has developed a proprietary methodology for completing ConPlans and AAPs and other HUD grant reports that has proven to be very successful in each of our projects. These plans serve as a comprehensive assessment of community needs and market gaps via stakeholder and community input and data analysis in order to develop strategic and deliberate plan for prioritizing and funding eligible activities with HUD grant funding. Our system allows for research and analysis to be conducted quickly while guaranteeing compliance with all regulations. Each report is customized to meet the unique needs of each client, from state-wide AIs to ConPlans for new grantees, our system works. We will supplement City staff by providing technical assistance and best practices, and work with staff to understand and incorporate local values and the community development setting.

eCon Planning Suite Experience

The Consolidated Plan will be developed using HUD's IDIS-based e-Con Planning Suite. It would be difficult to find a team more knowledgeable of this system. Our consultants have been involved with eCon since its inception. Furthermore, Civitas consultants have been contracted with HUD to provide direct training and technical assistance to grantees on IDIS. The Planning Suite provides streamlined data collection and a standardized template that provides grantees with greater certainty that their planning process adheres to HUD-guidelines and vision. Consultants will utilize the ConPlan template and include the most recently available data in the data tables, narratives, charts, and maps into IDIS. Civitas will enter the full Consolidated Plan into IDIS and submit for HUD approval per Federal guidelines and in accordance with the submission deadline.

Management Area

With our 13 years' experience working with HUD consolidated planning, we have established an efficient and effective process for completing high quality and compliant documents that are tailored to each grantee. Upon receiving the contract, our staff will begin with basic data collection and analysis using the most up to date data from HUD, the US Census Bureau, the Bureau of Labor Statistics, and many other sources, including previous ConPlans, Action Plans, and CAPERs. Our project manager will work closely with staff to determine any issues unique to the jurisdiction that the research staff should be made aware of.

SCOPE OF SERVICES

Project Approach Overview

Data Research and Mapping Analysis

The research staff works closely together, but each member has an area of responsibility to ensure that nothing falls through the cracks. Data Collection and Visualization occurs first and once complete the information is sent over to Research and Analysis in order to assess trends and construct narratives. By gathering all the data first, the analyst team is able to review a complete picture of the jurisdiction to prevent any assumptions or false conclusions early in the process. Analysts and lead writers will also provide a fresh set of eyes to identify any data points that stand out or need additional support. This phase also include policy research and analysis to incorporate pros/cons of local strategies that may affect affordable hosing, fair housing, etc.

Narrative

Portions of the ConPlan, AI/AFFH, and HNA will be completed at the same time when the issues being analyzed overlap. However, the ConPlan template will drive most of its required narrative in order to meet HUD requirements. Housing needs and fair housing assessment will have additional overlap in data, but a different scope for the AI and the HNA.

Once the narratives are complete the reporting is turned over to Compliance and Quality Control for review. Any areas of improvement or smoothing out are identified and then all three departments collaborate and work with each other to help guarantee a finalized document. Upon completion the document is sent up to the Lead Consultant for review.

Throughout the process, the Project Manager is working with the jurisdiction's staff and conducting public outreach events. Information gathered during these interactions are passed on to the Director of Operations who disseminates it to the rest of the Civitas staff as needed. The Director of Operations acts as a go-between for the project manager and the rest of staff to avoid any inefficient use of time.

Once the document is complete all members give it a final review. When there is a unanimous consensus that the product is complete it is passed on to the jurisdiction for review. Any requested edits are made to the document and then it is uploaded to IDIS for HUD review. In the unlikely event that HUD comes back with additional edits the staff immediately makes them and resubmits.

Public Involvement Action Plan

Citizen Participation & Stakeholder Consultation

Civitas will combine public/stakeholder outreach efforts for both the ConPlan, the Analysis of Impediments to Fair Housing Choice, and the Housing Needs Assessment in order to save on time, costs, and public interest.

Public Meetings

Civitas will work with City staff to develop and execute an effective communication and outreach strategy to ensure representative feedback is gathered from community stakeholders. City staff assistance in coordinating proper invites, venues, dates, and times of events will be needed.

Upon the completion of the initial data collection and analysis, our team will host:

- TBD stakeholder/focus group meeting
- TBD Technical Advisory Committee
- Two (2) community outreach meeting in person
- One (1) community outreach meeting virtually

Any key stakeholders that are unable to attend the focus group(s) will be interviewed via telephone conference call to ensure their participation in the consultation process.

Public and Stakeholder Survey

In addition to the public outreach and interviews, we will prepare an online survey to garner additional feedback form those that may want to respond anonymously or for those that are unable to attend one of the public events. There will be two versions of the survey, one for direct resident feedback as well as one slightly altered to gather feedback from stakeholder organizations.

Civitas has existing relationships with additional consultants that can assist with translation services as needed. We can provide translation of the public notices, the public survey and onsite for public meetings as requested. We will work with City staff to ensure sufficient notice is disseminated through proper communication channels.

SCOPE OF SERVICES

WORK PLAN - CONSOLIDATED PLAN

Overview

Civitas uses a mix of qualitative and quantitative methods to deliver a high-quality, HUD-compliant Consolidated Plan that will provide insights into economic development and the housing profile of the City. The ConPlan will serve as a foundational document to provide data-drive guidance for the use of HUD grant funds over the next five years.

The ConPlan and AAP will be developed using HUD's IDIS-based e-Con Planning Suite. All team members have received all relevant HUD training on the subject and have participated in the successful completion of numerous HUD-approved Con Plans. We will utilize the ConPlan template to import all relevant data tables, narratives, charts, and maps into IDIS. Our resulting documents include supplemental data and maps that go above and beyond the basic eCon requirements.

When necessary, CPD Maps will be used for spatial analysis and mapping. However, given that CPD Maps tend to be outdated, we will supplement them with custom maps using more recent data. These sources include Bureau of Labor Statistics, the HUD AFFH database, the US Census 2017-2021 ACS 5-Year Estimates, and additional sources when beneficial. Our primary mapping tool is PolicyMap.

Below is a description 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 Consolidated Plan. The components listed below are extracted directly from the IDIS template.

SCOPE OF SERVICES

WORK PLAN - CONSOLIDATED PLAN

Executive Summary

Civitas will work with staff to complete the seven different sections of the executive summary. Per CFR 91.220 (b) and (c), this section will lay out the objectives, outcomes, resources expected, an evaluation of past performance, and a summary of citizen participation and consultation, including a summary of all comments.

We will work with staff to create a succinct and informative introduction that will be accessible to all readers. A summary of the objectives and outcomes identified in the Needs Assessment will be provided to show how the City will use the available resources. This includes listing out the priority needs and associated goals. Civitas will work with the City and other public, private, and non-profit agencies to analyze the City's performance since the last Consolidated Plan.

Input from the community as a whole, as well as key stakeholders, is both necessary and valuable in creating an effective grant program. This section will highlight the community meetings, interviews with key stakeholders and public officials, and the online survey process that the consultant and City will use to gather feedback. We will develop and distribute an online survey and conduct public meetings and focus group meetings. We are prepared and experienced to give these presentations remotely and recommend this method over in-person for a broader reach to community and to control for travel costs. We will finalize dates and optimal method of meetings based on coordination with staff.

Civitas has overseen numerous public comment periods and public hearings; we will work with staff to ensure the process runs smoothly. Civitas staff will prepare all public notices required for these public engagement processes. A summary of this section will help readers understand the ConPlan process and sections to follow. This part can also include notes on data collection and analysis throughout the document, such as replacing the CPD Maps that use lagging ACS data with custom maps using the most current ACS data.

SCOPE OF SERVICES

WORK PLAN - CONSOLIDATED PLAN

Needs Assessment

We will develop an updated housing needs profile for the City. We will work with representatives to identify any additional data and information, including existing housing and/or homeless studies and information on special needs populations to supplement the readily available data from HUD and the US Census. After obtaining this information, the consultants will use it to develop a needs assessment for the City's review and approval.

The needs assessment will meet all of the minimum requirements of 24 CFR Part 91 and 570 and will include a housing needs assessment that analyzes the latest trends in population, income, tenure, poverty, and housing problems with a special emphasis on vulnerable populations such as low-income, ethnic and racial minorities, the elderly, and residents with disabilities. We will look at greater needs that may exist when persons of a particular racial or ethnic group experience housing problems or severe housing problems at a disproportionately higher rate of the jurisdiction.

An analysis of public housing within The City in cooperation with the Housing Authority will be conducted, along with the needs of residents who are experiencing homelessness in cooperation with The City, the Continuum of Care, and shelters within the City. We will assess the non-homeless special needs that addresses the needs of special populations in the City, including the victims of domestic violence or other crimes, elderly, residents with HIV/AIDS, residents with alcohol and drug addiction, and residents with a disability. We will also look at jurisdiction's need for public facilities, public improvements, and public services.

Note: Homeless Needs: The needs of residents dealing with homelessness is discussed throughout the Needs Assessment and Market Analysis. However, due to the vulnerability of this group it is important to give particular attention to those sections. Our staff has worked with jurisdictions across the country to address homeless. We will provide a concise summary of the nature and extent of homelessness within the City (including rural homelessness and chronic homelessness if 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 assessment will include a description of the nature and extent of homelessness by racial and ethnic group. As part of the homeless needs assessment, the consultant team will identify area facilities and services in place to provide for the homeless population. This shall include, at a minimum, the Continuum of Care, all emergency shelters, any homeless outreach program(s), as well as available transitional and permanent housing options.

WORK PLAN - CONSOLIDATED PLAN

Housing Market Analysis

In cooperation with local stakeholders and representatives, the consultant team will develop a housing market analysis. The analysis will use information from interviews, surveys, public meetings/hearings, census data, and consultation with local officials and leaders. The market analysis will include the number and type of units available for rent and purchase, the cost of housing for both homeowners and renters, which will include a discussion of affordability and whether there is currently sufficient housing stock, and the condition of housing (including substandard housing, age of housing, vacancy rates, and lead-based paint hazards, and the need for any rehabilitation of homes).

The availability of public and assisted housing within the City and the Housing Authority's strategy moving forward will be highlighted. A look at homeless facilities and services and whether they meet the needs of the community will be described, along with the availability of special needs facilities and services to assist the elderly, residents with disabilities, HIV/AIDS, alcohol or drug addiction, or facing homelessness.

Barriers to affordable housing that have been identified in the Analysis of Impediments to Fair Housing Choice and other documentation will be summarized in this section as well.

An analysis of non-housing community development assets including business activity, labor force participation, commute times and impact, education, and business needs in the community will be done, followed by a discussion of the needs and market analysis with a focus on concentrations of problems that disproportionately impact protected groups.

Lastly, two newer requirements will be covered: Broadband access analysis will be conducted to identify the "digital divide" with respect to availability of internet access, specifically in LMI areas. Research and consultation will be done with emergency management, and other agencies whose primary responsibilities include the management of flood prone areas, public land, or water resources regarding the vulnerability of housing occupied by low-or moderate-income households to natural hazards associated with climate change.

SCOPE OF SERVICES

WORK PLAN - CONSOLIDATED PLAN

Strategic Plan

The Strategic Plan section of the Consolidated Plan lays out the City's plan to address the needs identified in the previous sections. The next five years will be laid out with geographic areas, priority needs, associated goals, and expected resources included. The strategic plan will be consistent with the minimum HUD requirements as outlined in CFR 24 Part 91 as well as with other guidance issued by HUD. Goals and priority needs will be broad enough to allow flexibility in planning and administering a variety of activities.

Lead consultant Erich Chatham will work closely to develop this section of the plan to ensure the identified priority need and goals are appropriate for the jurisdiction. With proper development of this section, the grantee should be able to avoid any substantial amendments to the Consolidated Plan in the future.

The strategic plan will include the Priority Needs of the City with assigned level of priority, the population and geographic area that will be targeted, and which goals area associated with that need. We'll also cover market conditions, anticipated federal resources, and Institutional Delivery Structure.

Civitas will assist in the development of the 5-Year goals for the City which will include the category of the goal, geographic area affected, needs addressed, funding to be allocated, and a clear, measurable goal outcome indicator.

The plan will also describe any need to increase accessible units or resident involvement in public housing units, the strategy to remove or address barriers to affordable housing, the City's strategy to assist residents who are dealing with homelessness or are at risk of facing homelessness, and the City's anti-poverty strategy, including goals, programs, and policies aimed at reducing the number of poverty-level families. Lastly, the standards and procedures used to monitor activities carried out with HUD funds will be defined.

SCOPE OF SERVICES

WORK PLAN - CONSOLIDATED PLAN

Annual Action Plan

Civitas will develop an Annual Action Plan that supports the objectives and strategies outlined in the previous assessments, analyses, and the Five-Year Strategic Plan. Specific benchmarks and 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, 24 CFR Part 570, as well as any other guidance from HUD.

In general, the AAP will include the annual goals that are tied to the Consolidated Plan and describe categories, needs addressed, and outcomes for the City, specific projects including planned activities, along with a more detailed layout of projects that will be undertaken with funding and targeted needs.

The presence of any geographic areas that will be receiving directed assistance, particularly in R/ECAP tracts within the jurisdiction will be defined, along with affordable housing activities that will be undertaken; to include actions planned to remove barriers to affordable housing in the City.

The AAP will define the Actions planned to assist public housing in the next year and the One-year goals for reducing the number of residents facing homelessness, particularly the chronically homeless, families with children, veterans and their families, and unaccompanied youth. Lastly, any other actions planned to improve the housing situation in city that has not been discussed elsewhere will be expanded upon.

SCOPE OF SERVICES

WORK PLAN - ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

Overview

Fair housing has long been an important issue in American urban policy – a problem born in discrimination and fueled by growing civil unrest that reached a boiling point in the Civil Rights Movement. The passing of the Fair Housing Act in 1968 was a critical step towards addressing this complex problem – but it was far from a solution. Since the passing of the Act community groups, private business, concerned citizens, and government agencies at all levels have worked earnestly at battling housing discrimination. The Fair Housing Act mandates that the Department of Housing and Urban Development (HUD) 'affirmatively further fair housing' through its programs. Towards this end HUD requires funding recipients to undertake fair housing planning (FHP) to proactively take steps that will lead to less discriminatory housing markets and better living conditions for minority groups and vulnerable populations. The Analysis to Impediments to Fair Housing Choice is a critical component of HUD's fair housing efforts.

Our organization has participated in creating numerous AIs and we are familiar with the process and format, including the areas that require annual updates and analysis. Policy recommendations will be made to address any barriers or impediments found during the analysis. The AI will be conducted in full compliance with all relevant federal, state, and local laws and regulations, including HUD's Fair Housing Planning Guide. The AI will utilize all relevant HUD guidance – including definitions for housing types and income levels- as set forth in CFR's, handbooks, and notices. The AI will conform to HUD's requirements and suggested format as detailed in the "Fair Housing Planning Guide."

Our standard AI template outline will include:

- Executive Summary
- Community Profile
  - Demographics
  - Economic Profile
  - Housing Profile
- Public Sector Analysis
- Private Lending Analysis
- Fair Housing Profile
  - Fair Housing Complaints
  - Public Input
- Identification of Fair Housing Choice Impediments
- Fair Housing Action Plan

SCOPE OF SERVICES

WORK PLAN - ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

In conducting an AI, the City will certify compliance with the Fair Housing Act's Affirmatively Furthering Fair Housing (AFFH) requirement and go beyond the obligations currently outline in HUD's June 10, 2021 Interim Final Rule. Civitas will prepare a comprehensive demographic profile, housing profile and an economic profile of the City. Civitas has developed a proprietary data collection and analysis methodology for completing AIs that has proven to be very successful. Our system allows for research and analysis to be conducted quickly while guaranteeing compliance with all regulations. Each report is customized to meet the unique needs of each client, from state-wide assessments to smaller rural communities, our system works. Data sources to be utilized includes but is not limited to the following: HUD's latest CHAS data, 2010 and 2020 Decennial Census, Home Mortgage Disclosure Act (HMDA), and the 2017-2021 American Community Survey 5-Year Estimates. Data will also be gathered from state and local agencies.

In addition to narratives, graphs, and tables, data will be presented geographically by Census Tract using mapping services provided by public and private agencies, as well as custom geographic information system (GIS) mapping.

The comprehensive housing profile will be included to provide a detailed overview of the housing stock within the jurisdiction. This profile will be combined with demographic and jurisdictional background to serve as a foundation for a data-driven review of fair housing. For example, comparing the area median income (AMI) with housing prices will allow an assessment of housing affordability and affordable housing gaps by income. Racially and/or Ethnically Concentrated Areas of Poverty (R/ECAPs) will also be analyzed as a barrier to fair housing. Mapping software and services such as OneCPD, PolicyMap, ArcGIS, Tableau, and the HUD-provided AFFH Mapping Tool will be used to display relationships between any key housing and demographic variables. Some of the data points that will be explored and analyzed include sales figures, construction activity, tenure, condition, vacancy, and age of housing.

SCOPE OF SERVICES

WORK PLAN - ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

The AI will also include the most recent information as it pertains to:

- A comprehensive review of planning, development and housing programs, laws, policies, zoning ordinances and others to assess how they influence the availability and accessibility of local housing. This includes an evaluation of the City's grant programs for proper practices, monitor compliance, and performance measures. Civitas will conduct surveys with key stakeholders, government officials, community leaders, and the public to help complement the data analysis.

- State and local laws, zoning regulations and practices, housing programs, and policies will be analyzed against the backdrop of HUD guidelines, as well as national best practices and research.

- A review of the City's fair housing legal status will be reviewed. This includes a review of all fair housing complaints sent to state, federal, and local fair housing entities, as well as any findings of discrimination and suits filed by the Department of Justice or individuals.

- An assessment of public-sector conditions that may influence fair housing choice for protected classes. Examples of such items include tax policies, municipal services, transportation accessibility, building codes, tenant selection policies for public housing, segregation, access to quality education, and displacement of residents due to economic and public housing factors.

- An assessment of private-sector conditions and practices that may influence fair housing choice. The main item of importance here is lending practices and may include "steering" certain demographics into certain neighborhoods based on race, sex, religion, or other protected classes. Discriminatory practices in the rental market by property management and leasing agents are also a concern. Data for private sector practices will be collected from Home Mortgage Disclosure Act (HMDA) reports, local industry associations, fair housing complaints, and other available sources.

- The extent of fair housing enforcement and compliance, informational programs on fair housing and citizens' rights under the Fair Housing Act and any applicable state or local laws, and accessibility for the disabled are areas that will be reviewed for both public and private sectors.

WORK PLAN - ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

Fair Housing Action Plan

Once the community outreach and data analysis are completed, Civitas consultants will work with City staff to delineate any identified impediments to fair housing choice prevalent within the City. Civitas, with staff support, will then develop a Fair Housing Action Plan. This plan will establish goals to address each of the identified impediments to fair housing choice. The Fair Housing Action Plan will also include proposed outcome measures or benchmarks that can assist in measuring progress towards meeting these goals. These benchmarks will serve as actions to be taken annually throughout the Five-Year Consolidated Plan to address identified impediments and prioritization.

Final Presentation

HUD does not require a public comment period or a public hearing for the Analysis of Impediments to Fair Housing Choice. However, many jurisdictions choose to conduct both in an effort to encourage community participation. As part of our proposed fee, Civitas will prepare a standardized public presentation of the final AI for City and/or local jurisdictions to present at to the public at an event to be determined by the City. Should the City request Civitas to present findings at public meetings, we will be happy to oblige for an additional fee.

SCOPE OF SERVICES

HOUSING NEEDS ASSESSMENT & HOUSING PLAN

Housing Needs Assessment

The housing needs assessment (HNA) will investigate current and future housing needs. It will account for recent changes to the economic, social, and political landscape. It will provide a deep-dive analysis and incorporate available data and public participation.

We will highlight housing data to augment our understanding of the current trends in order to fully detail the housing challenges faced by many households in the community. We will compile data estimating the number and type of housing units in each geographic subregion, and trends in production of housing. If available, aggregated information from Multiple Listing Service (MLS) will also be utilized to indicate active housing market metrics. We will compile information about the number of housing units of various types within the region of analysis. These housing figures will be broken out by type (e.g., Owner-Occupied vs. Rental Housing; Single Family Dwellings vs. Medium and High-Density options, etc.). We will uncover trends such as housing valuations, rental costs, vacancy rates, permitting trends, density by neighborhood, and other such metrics. We will also analyze housing affordability for the population according to standard groupings: (i.e.: Extremely low income (<30% AMI); Very low income (30 to 50% AMI); Low income (50 to 80% AMI); Workforce housing/Moderate income (80% to 100% AMI); Above Median income (100%+ AMI).

The future housing needs assessment will deep-dive into population, economic and socio-economic trends to identify housing needs, types and locations. This should correspond with the City's Comprehensive Plan. A future housing assessment should 'right-size' anticipated growth and calibrate where housing is likely to be developed. It can inform the City where incentives may be appropriate and where additional legal provisions may need to be established to protect culturally significant and environmentally sensitive places, neighborhoods, and land.

Final Housing Plan

Based on an understanding of current and future needs, we will develop a variety of strategies related to development: regulations, impact fees, system development charges, and permitting processes, multiunit housing development incentives, etc. The strategies for policy updates that pertain to development or re-development will also accommodate a range of housing options and align with the City's goals, Comprehensive Plan, zoning and geographical constraints.

We will produce a final Housing Plan and deliverables package based on current and future assessments, and a summary of inputs from stakeholders. It will also include the comments received from community engagement activities and events. This includes final visualizations and graphics. We understand this may an iterative process. We will then provide the final Plan to the City in final format.

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CHRYSALIS

RESEARCH + CONSULTING, LLC



Table of Contents

Firm Information	3
Cover Letter	4
Firm History	5
Previous Experience	8
Timeline	14
Personnel	15
Project Cost	33
References	34

FIRM INFORMATION

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MBE/WBE/DBE STATUS

Chrysalis Research & Consulting, LLC is a minority-owned business enterprise, women-owned business enterprise, and disability-owned business enterprise. Principal and founder Shuna Mason owns 100% of the firm. We are committed to partnering with various municipalities and qualifying populations in the hope that we can assist in shaping the housing environment that can be suitable for the citizens and the governing body.

INSURANCE REQUIREMENTS

Proof of Chrysalis's current insurance coverage is available upon request. Should The City of Council Bluffs Community Development Department select Chrysalis as a contractor, Chrysalis certifies that it will obtain any additional insurance coverage to meet the minimum limits stipulated in any Risk Management Provisions – Insurance and Indemnification for the City.

COVER LETTER

The City of Council Bluffs Community Development Department| 209 Pearl St
Council Bluffs, IA 51503

Dear RFP Administrators:

Congratulations on your jurisdiction's qualification as an entitlement community under the HOME Investment Partnership. Chrysalis Research & Consulting, LLC welcomes the opportunity to offer this response to your Request for Proposals and stands ready to assist your community in preparing The City of Council Bluffs Community Development Department's Consolidated Plan, Action Plan, and Affirmatively Furthering Fair Housing document.

Chrysalis is uniquely positioned to assist the city with its planning services and other issues related to compliance with HUD guidelines and regulations. We understand that this planning process is designed to help the city with the community and economic development, assessing and planning for projected housing, special-needs population, and homelessness reduction and prevention needs.

The City of Council Bluffs has been an integral participant in policy reform in the history of the state of Iowa. Dedication to human well-being and higher standards of education is synonymous with the culture and environment of The City of Council Bluffs. Chrysalis Research & Consulting, LLC looks forward to assisting The City of Council Bluffs in keeping with these traditions with possibly a collaborative effort in writing the Consolidated Plan, Action Plan, and Affirmatively Furthering Fair Housing for the City of Council Bluffs. Chrysalis's consultants bring over 20 years of combined experience assisting local governments with planning and analysis needs related to HUD's CDBG and other formula grant programs.

Chrysalis' consultants have completed more than 20 fair housing and affordable housing studies, Consolidated Plans, Annual Action Plans, Neighborhood Revitalization Strategy Area Plans, Citizen Participation Plans, CAPERs, and HOME American Rescue Plan (HOME ARP) Allocation Plan for over 20 client jurisdictions across the United States. Chrysalis professionals stand ready to assist with completing these analyses in alignment with HUD legal requirements and contribute to data entry using HUD'S eCon and IDIS systems.

Chrysalis is dedicated to an inclusive stakeholder and community resident engagement process that incorporates feedback and needs of all relevant stakeholders, including those from disparate, vulnerable, and special needs populations. Therefore, as needed, Chrysalis is pleased to offer the plans with stakeholder and public engagement, including surveying and community meetings in Spanish. We also open our availability to evenings and weekend community meetings.

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

Chrysalis professionals are skilled at public outreach and engagement with racial and ethnic minority populations, including African American, Latino, and immigrant populations. We also work with the design of fair housing practices for additional special needs populations, including disability housing and senior housing, female-headed households, and multi-generational family housing.

At Chrysalis, we understand that fair and affordable housing availability is critical to sustainable economic growth and competitiveness. That's why our solutions are not only tailored to address local needs but are designed with implementation in mind. Our recommendations are realistic and actionable, and measurable so that our clients can demonstrate concrete results to stakeholders and citizens. Chrysalis's team offers extensive experience in community assessment, planning, and economic development, focusing on affordable and fair housing, stakeholder engagement, needs assessment, quantitative research, and GIS mapping.

Because our background encompasses planning, grant management, public administration, economic development, and social service administration, our firm has a unique understanding of the work to be performed for The City of Council Bluffs Community Development Department. We will include:

- Other recent plans and research.
- Collaboration with other local planning efforts.
- Meaningful community engagement.
- Insightful data analysis.
- Sound strategy recommendations.

We have familiarity and expertise with HUD'S regulatory requirements for the plans requested in the RFP, including HUD's Office of Fair Housing and Equal Opportunity AI Checklist. Chrysalis has the skill to assist the city with preparing the documents through the assessment, planning, and implementation processes.

As the undersigned representative, I am authorized to negotiate a potential contract on behalf of Chrysalis Research & Consulting, LLC. Chrysalis has no ongoing, pending, or possible legal actions against the firm. Feel free to contact me at 1(844)230-0454 via email at jason@thechrysalisconsultants.com or by mail at Chrysalis Research & Consulting, 1201 West Peachtree NW, Suite 2300, Atlanta, GA 30309.

FIRM BACKGROUND, HISTORY, AND QUALIFICATIONS

Firm History and Management

Chrysalis Research & Consulting, LLC is a Minority Business Enterprise/Women Business Enterprise/Disability Business Enterprise and limited domestic liability company organized under Georgia law, established in July 2019. The firm is owned and managed by its principal, Shuna Mason, and no overall corporate management or ownership changes are anticipated. The firm has four additional subcontractors that provide research, consultation, policy analysis, and technical assistance to clients full-time.

Chrysalis was formed with a firm understanding of the myriad factors that impact affordable housing, fair housing, and community and economic development. We understand that multiple economic, social, and political factors influence building healthy communities that uplift residents. For this reason, Chrysalis is committed to providing multidisciplinary and multidimensional research and consulting, incorporating expertise from fields such as urban planning, public administration, business, finance, social work, community health, and sociology.

The vast experience of our consultants allows us to conduct needs assessments that focus on intersectional factors that affect fair and affordable housing, community development, and economic viability. Our comprehensive needs assessments will enable us to design customized and workable solutions, best practices, and action plans that comply with HUD regulatory requirements and promote your community's and its residents' success.

Chrysalis is firm in its commitment to inclusivity in the public engagement process. It offers a community and stakeholder engagement process designed to improve the capacity to reach diverse community residents. Chrysalis is dedicated to a truly collaborative community process that incorporates diverse stakeholders in race, ethnicity, gender, income, religion, physical/mental ability, and perspective. These interactions with various people allow us to experience the full recognition of the breadth of community citizens and stakeholders impacted by the planning process. Chrysalis is proud to offer the availability of Spanish translation during the public engagement process as applicable, as well as evening and weekend community meetings.

Chrysalis professionals have over 20 years of combined experience addressing issues related to housing, including completing more than 20 fair housing and affordable housing analyses for clients across the country. These products included fair housing and equity assessments and analyses of impediments to fair housing choice for HUD grantees, housing market analyses and housing needs assessments for municipal clients, and a housing planning study for a state government regarding the reconstruction of affordable housing lost to a natural disaster. Our previous clients have included single municipalities and counties, consolidated governments, and multi-jurisdictional bodies. Our professionals have prepared fair housing analyses for rural,

suburban, and urban clients with populations ranging from 10,000 to more than four million residents.

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Shuna Mason's background includes leadership positions within neighborhood revitalization projects, legal and legislative research, and the development of special needs housing strategies. Shuna is skilled in community asset mapping, a crucial component for assessing community needs and developing an affordable housing strategy that guides recommendations on where housing can be located to optimize the public amenities available to residents. Shuna has conducted and presented academic research on social phenomena, including concentrated poverty and economic mobility, which are essential factors that are frequently intertwined with affordable housing.

Jonathan Lynn has over 15 years of experience in public administration and more than ten years of experience working with the administration of the CDBG program. He has managed grant-funded projects ranging from $500,000 to $111 million related to housing development, public transportation, and job creation. His areas of expertise include the legal analysis of zoning and land-use policies, green (eco-friendly) land use and developmental policy, and leveraging public-private partnerships to promote community economic viability. As a consultant and public administrator, Jonathan has conducted over 15 affordable and fair housing studies, consolidated plans, comprehensive plans, master plans, and annual action plans.

Jason Wright has extensive experience in fiscal and economic policy, as well as banking, finance, and business development. His areas of expertise include policy related to mortgage lending, credit extension, and small business loan programs. He has achieved revenue generation for both businesses and nonprofits through procurement, portfolio management, and effect costs analysis and projections.

PREVIOUS EXPERIENCE

Chrysalis consultants have completed more than 30 assignments with scopes of work relevant to the proposed approach, such as fair housing analyses, affordable housing supply analysis, income-based housing needs assessment, community outreach, best practice research related to adequate housing, equitable strategy development, legal research regarding fair housing, zoning and ordinances, assessment of homeless and special population housing needs, and implementation planning to promote fair housing choice.

Our combined experience Consolidated Plan, Action Plan and Affirmatively Furthering Fair Housing documents for the City of Council Bluffs throughout the US highlights our understanding of similar housing market challenges The City of Council Bluffs Community Development Department, faces. With the city's overall goals in mind, our team will build on the city's housing vision to ensure that the city remains compliant with the latest HUD Fair Housing Office Policy guidance, HUD Community Planning, and Development Notices. Similar work is detailed below:

City of New Rochelle Consolidated Plan, Annual Action Plan. HOME ARP Program, and First Time Home Buyers Down Payment Assistance Program	
Location	New Rochelle, NY
Scope of Work	Consolidated Plan and Annual Action Plan • Needs assessment estimating housing needs (cost burdens by income level), homeless needs, and demand for accessible and special needs housing. • Market analysis analyzing the existing supply of affordable housing (by income level), homeless facilities, accessible housing, and other special needs housing units/programs. • Strategic plan to address priority housing needs over the next five years using HUD HOME and CDBG grants in combination with state, local, and private funds. Analysis of Down Payment Assistance Documents • Analysis of local housing supply, zoning and building codes, community resources, and other regulatory and market factors to identify barriers to fair housing choice due to race, ethnicity, national origin, religion, sex, disability status, or familial status. • Update all documents that are related to the Down Payment assistance program. HOME ARP Program • Identify Qualified Persons defined by HUD under the new parameters of the HOME-ARP program and prioritize the needs of said demographic. • Develop a funding plan based on the Gap analysis findings. Indicate the amount of HOME-ARP funding planned for each eligible activity. The First Time Home Buyers Down Payment Assistance Program

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

	• Establish appropriate home ownership programmatic approaches, in their marketplace, to attract and support buyers to invest in properties in targeted neighborhoods. • Demographic analysis: • Some of the data that was instrumental in completing the Gap analysis can be integral in developing a demographic profile for potential home buyers. Conducting a demographic analysis that includes important data like median age, household size, income, and population growth patterns will be beneficial in understanding the demand side of the market analysis. • Public Outreach Community meetings (2), focus groups (2), individual and small group interviews, online and hard • Methodology Review of existing plans, zoning, and other regulatory codes, and current affordable and fair housing resources. • Quantitative analysis of Census, American Community Survey, Comprehensive Housing Affordability Strategy (CHAS), HUD, Bureau of Economic Analysis, Home Mortgage Disclosure Act (HMDA), and other local, regional, and national data. • Qualitative analysis including a week-long site visit to conduct community outreach. • Results: Based on our research, the city prioritized its affordable housing incentive program and submitted a funding proposal for a needs-based capital improvements plan, targeted. Based on research, the City focused on the adoption of visibility ordinances by 2020 and began the formation of a regional civil rights organization to address fair and affordable housing issues• • Demographic analysis: Some of the data that was instrumental in completing the Gap analysis can be integral in developing a demographic profile for potential home buyers. Conducting a demographic analysis that includes important data like median age, household size, income, and population growth patterns will be beneficial in understanding the demand side of the market analysis. • Public Outreach Community meetings (2), focus groups (2), individual and small group interviews, online and hard copy survey in English and Spanish; Over 200 participants. Methodology Review of existing plans, zoning and other regulatory codes, and current affordable and fair housing resources. • Quantitative analysis of Census, American Community Survey, Comprehensive Housing Affordability Strategy (CHAS), HUD, Bureau of Economic Analysis, Home Mortgage Disclosure Act (HMDA), and other local, regional, and national data. • Qualitative analysis including a week-long site visit to conduct community outreach. • Results: Based on our research, the city prioritized its affordable housing incentive program, and submitted a funding proposal for a needs-based capital improvements plan, targeted. Based on research, the City focused on the adoption of visibility ordinances by 2020 and began the formation of a regional civil rights organization to address fair and affordable housing issues
Public Outreach	Community meetings (2), focus groups (2), individual and small group interviews, online and hard copy survey in English and Spanish; Over 200 participants.
Methodology	• Review of existing plans, zoning and other regulatory codes, and current affordable and fair housing resources. • Quantitative analysis of Census, American Community Survey, Comprehensive

	Housing Affordability Strategy (CHAS), HUD, Bureau of Economic Analysis, Home Mortgage Disclosure Act (HMDA) and other local, regional, and national data. • Qualitative analysis including week-long site visit to conduct community outreach.
Results	Based on our research, the city prioritized its affordable housing incentive program, submitted a funding proposal for a needs-based capital improvements plan, targeted. Based on research, the City focused on adoption of visibility ordinances by 2020, and began formation of a regional civil rights organization to address fair and affordable housing issues

City of East Orange Consolidated Plan, Annual Action Plan & Analysis of Housing Situation as well as Review of the Home Investment Partnership documents.	
Location	East Orange, New Jersey
Scope of Work	Consolidated Plan and Annual Action Plan • Needs assessment estimating housing needs (cost burdens by income level), homeless needs, and demand for accessible and special needs housing. • Market analysis analyzing the existing supply of affordable housing (by income level), homeless facilities, accessible housing, and other special needs housing units/programs. • Strategic plan to address priority housing needs over the next five years using HUD HOME and CDBG grants in combination with state, local, and private funds. Analysis of Down Payment Assistance Documents • Analysis of local housing supply, zoning and building codes, community resources, and other regulatory and market factors to identify barriers to fair housing choice due to race, ethnicity, national origin, religion, sex, disability status, or familial status. • Update of all documents that are related to the Down Payment assistance program.
Public Outreach	Community meetings (2), focus groups (2), individual and small group interviews, online and hard copy survey in English and Spanish; Over 200 participants.
Methodology	• Review of existing plans, zoning and other regulatory codes, and current affordable and fair housing resources. • Quantitative analysis of Census, American Community Survey, Comprehensive Housing Affordability Strategy (CHAS), HUD, Bureau of Economic Analysis, Home Mortgage Disclosure Act (HMDA) and other local, regional, and national data. • Qualitative analysis including week-long site visit to conduct community outreach.
Results	Based on our research, the City prioritized its affordable housing incentive program, submitted a funding proposal for a needs-based capital improvements plan, targeted. Based on research, the City focused on adoption of visibility ordinances by 2020, and began formation of a regional civil rights organization to address fair and affordable housing issues

City of Durham Consolidated Plan, Action Plan, NRSA, & Analysis of Impediments to Fair Housing Choice	
Location	Durham, North Carolina

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

Scope of Work	• Consolidated Plan, NRSA, and Annual Action Plan – Needs assessment and market analysis comparing affordable, accessible, and special needs housing demand to existing supply. Strategy to address priority needs using HUD grants with other public and private funds. • Analysis of Impediments to Fair Housing Choice – Analysis of housing supply, zoning codes, community resources and other regulatory and market factors to identify barriers to fair housing choice. Recommendations to address barriers and preserve/expand supply of affordable, accessible, and special needs housing.
Public Outreach	Community meetings (4), (1) focus group, individual interviews, online and hard copy survey in English and Spanish, project website; Over 250 community participants.
Methodology	Quantitative analysis and mapping of Census, American Community Survey, CHAS, HMDA, HUD, and other local, regional, and national data. Qualitative analysis including plan review, zoning code review, and week-long site visit to conduct public outreach.
Results	Based on our research, the City plans to allocate additional funds for rental housing versus a primary focus on homeownership assistance. Other recommendations include zoning code revisions, regulatory changes to allow additional rental housing, fair housing education activities, and incentives for workforce and accessible housing development.

St. Louis City and Cities of Florissant and O'Fallon Analysis of Impediments to Fair Housing Choice	
Location	St. Louis County, City of Florissant, and City of O'Fallon, Missouri
Scope of Work	Analysis of housing supply, zoning codes, community resources and other regulatory and market factors to identify barriers to fair housing choice. Recommendations to address barriers and preserve/expand supply of affordable, accessible, and special needs housing.
Public Outreach	Community meetings/hearings (8), individual interviews, online and hard copy survey in English and Spanish, project website; Over 100 participants and 300 website visitors
Methodology	Quantitative analysis and mapping of Census, American Community Survey, CHAS, HMDA, HUD, and other local, regional, and national data. Qualitative analysis including plan review, zoning code review, and week-long site visit to conduct public outreach. Review of eight zoning ordinances.

Results	Recommendations focused on strategies and incentives to encourage affordable and mixed income housing development, including in areas of the City with superior access to public resources. Zoning code revisions were also recommended, specifically to address restrictive definitions of "family" and related occupancy permitting requirements.

Client List

In addition to the projects outlined above, Chrysalis professionals have provided a variety of housing planning services to jurisdictions throughout the U.S. Below is a list of clients that we have successfully completed projects for, shown by product type:

Product/Key Services	Clients
Analyses of Impediments to Fair Housing Choice Fair Housing Equity Assessments	Athens-Clarke County, GA Cobb County, GA Gwinnett County, GA City of Gainesville, GA City of Rome, GA City of Roswell, GA City of Savannah, GA City of Durham, NC City of Dothan, AL City of Mobile, AL City of Wellington, FL St. Charles County, MO St. Louis County, City of O'Fallon, City of Florissant, MO Town of East Hartford, CT Waukesha County, WI Maricopa County, AZ City of Mesa, AZ City of Phoenix, AZ County of San Bernardino, CA
Consolidated Plans, Comprehensive Plan Housing Elements, and/or Housing Needs Assessments	Cobb County, GA City of High Point, NC Durham, NC Waukesha County, WI Williamson County, TX City of Mesa, AZ San Bernardino County, CA Surry County, VA Tybee Island, GA Tyrone, GA Douglassville, GA Waycross, GA Plano, TX Osceola County, FL Fort Meyers, FL

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

Proposed Schedule for Completion of The City of Council Bluff Department's Consolidated Plan, Action Plan, Affirmatively Furthering Fair Housing Update					
TASKS	**2023**				
	Jan-Feb	**Mar-Apr**	**May-June**	**July-Aug**	**Sept-Oct**
STAGE 1: PROJECT KICKOFF					
Initial Meeting					
Community Virtual Tour					
Review of Previous Plans/ Fair Housing Analysis Consolidate Plan, Home Program					
Community Engagement Review					
STAGE 2: NEEDS ASSESSMENT/ FAIR HOUSING ANALYSIS					
Community Meetings, Interviews					
Assessment of Community Needs/Fair Housing Barriers/Review of Fair Housing Complaints					
Demographic Profile of Qualified People					
Multiple virtual and phone meeting for stakeholders					
Market Analysis					
Assessment of Current Resources/Fair Housing Activity/Homeless Activities and Services					
Economic Analysis/Concentrations of Protected Classes, Poverty, & Lower-Income Families/Housing					
Publish notice of public hearing on proposed funding allocation					
Affordable and Housing Projections					
Barriers to Community Services and Affordable Housing					
STAGE 3: COMMUNITY, AND ECONOMIC NEEDS					
First drafts of CON Plan, Action Plan, completed					
30 Day Review Period					
Presentation of Draft Assessments and Strategies for Action Plan					
STAGE 4: ACTION/IMPLEMENTATION PLAN					
Plan Revision/Presentations of Annual Action Plan					
Affirmatively Furthering Fair Housing Update					
Submission of Revised Draft					
Submission of Final Assessment to IDIS					

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

TEAM MEMBER EXPERTISE	
Shuna Mason, Principal and Project Manager	• Affordable, fair, special needs, and workforce housing policy • Community engagement, surveying, and asset maps • Neighborhood engagement, revitalization, and preservation best p • GIS mapping and analysis • Public outreach to diverse communities • Legal research and analysis • Implementation and action planning
Jonathan Lynn, Senior Consultant	• Affordable housing policy, resources, and best practices • Zoning and land use policy • Public Infrastructure analysis • Economic development planning • GIS mapping
Michelle Sherill, Consultant	• Homeless needs assessment and prevention best practices • Accessible, supportive, and special needs housing best practices • Community/Stakeholder engagement • Community needs assessment • Community outreach to disparate and minority populations
Jason Wright, Consultant	• Economic Policy and analysis • Business development • Fiscal policy and analysis • Small business outreach and engagement • Economic development
Mecca Luster, Consultant	• Socioeconomic analysis • Small business development and job creation • Economic development planning • Community outreach with diverse populations

Resumes



EDUCATION

University of Kentucky
Lexington, Kentucky, 2019, Ph.D. in Social Work,

Bryn Mawr College Graduate School of Social Work and Social Research, Bryn Mawr, MA in Social Service and
Master of Law and Social Policy
Pennsylvania, 2003

Hendrix College,
Conway, Arkansas, June 2001,
BA in Sociology/Anthropology

SAMPLE PROJECT EXPERIENCE

Waukesha County, WI, *Analysis of Impediments to Fair Housing Choice, Consolidated Plan, Annual Action Plan*

City of Mesa, AZ, *Analysis of Impediments to Fair Housing Choice, Consolidated Plan, Annual Action Plan*

County of San Bernardino, CA, *Analysis of Impediments to Fair Housing Choice, Consolidated Plan, Annual Action Plan*

Town of East Hartford, CT, *Analysis of Impediments to Fair Housing Choice*

City of Phoenix, AZ, *Analysis of Impediments to Fair Housing Choice*

Maricopa County, AZ, *Analysis of Impediments to Fair Housing Choice*

Shuna L. Mason, PhD., Principal
(1(844)855-5580
Shuna@achrysaliscommunity.com

Shuna is a public policy and research analyst with extensive experience in fair and affordable housing, community economic development, social science research, academia, and non-profit management. Her specializations include the impact of socioeconomic factors on labor development,
economic mobility, community economic development, and health and educational disparities. Her background includes housing and community needs assessments, fair housing studies, community revitalization plans, public opinion surveys, technical assistance to federal grantees, project management for federal grants, and legislative consultation on health, education, and economic development.

Shuna's research experience includes the impact of housing and federal funding on business and community development, the impact of capital access on small business and workforce development, and ethnographic research on land use policies. She has presented research findings at national and international conferences.

Principal, Chrysalis Research & Consulting, Atlanta, GA, 2019 – Present

- Serve on project teams for community development consulting engagements, including fair housing studies; affordable housing needs assessments, comprehensive plans, and other community development studies.

Principal, Mosaic Community Planning, Atlanta, GA, 2015 – Present

- Serve on project teams for community development consulting engagements, including fair housing studies; affordable housing needs assessments, comprehensive plans, and other community development studies.

Research Consultant, WFN Consulting, Marietta, GA, 2014 – 2015

- Assisted public sector clients in identifying housing, community development, economic development, and fair

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

housing needs through analyses of impediments to fair housing, fair housing equity assessments, consolidated plans, comprehensive plans, and market analyses.
- Designed and implemented quantitative and qualitative data analysis, including surveys, focus groups, and interviewing processes.
- Conducted research and analysis in socioeconomics, housing, economic development, health, education, and poverty in varying geographical areas.
- Analyzed demographic patterns to determine levels of access to economic, educational, health, and housing opportunity factors.
- Identified community assets and gaps in access, along with strategies for encouraging small business development and community economic revitalization.

Bachelor of Social Work Program Director & Assistant Professor
Union University, Memphis, TN, 2010 – 2014

- Partnered with community organizations to conduct community asset mapping, needs assessments, revitalization efforts, workforce development, and promote positive educational and health outcomes.
- Provided training and technical assistance to over 75 practice sites including community organizations, educational institutions, non-profits, and public and private institutions.

Research Assistant, University of Kentucky – Green Dot Project, Lexington, KY, 2011 – 2013

- Provided research support for a project designed to prevent sexual violence through bystander education.
- Conducted and analyzed results of stakeholder interviews, focus groups, and community surveys.
- Assisted in data management and analysis, training and technical assistance, and literature reviews.

Patient Services Manager, Leukemia & Lymphoma Society, Memphis, TN, 2007 – 2010

- Coordinated community outreach initiatives and health advocacy campaigns.
- Completed community public health programming on health disparities and clinical trials access in African- American and Latino communities.

- Designed, planned, and implemented state public health conferences and campaigns through collaboration with government officials, community stakeholders, local hospitals and clinics, educational institutions, and the media.
- Built strategy and provided technical support and consultation for a local 10-Year Plan to end chronic homelessness.

EDUCATION

Georgia Southern University,
Statesboro, Georgia, MPA

Georgia Southern University,
Statesboro, Georgia, BA in Political Science

TRAINING

- Graduate, Leadership Tybee Island
- Graduate, Leadership Douglas County
- Graduate, Georgia Academy of Economic Development
- ICMA Emerging Leaders Development Program
- Gettysburg Leadership Institute

SPECIALTIES

- Strategic Planning
- Resource Allocation
- Statistical Analysis
- Capital Improvement Planning
- Project Management
- Comprehensive Planning

Jonathan Lynn, MPA, Senior Consultant
1(844)855-5580
jonathan@AChrysalisCommunity.com



Jonathan Lynn is a senior level consultant with extensive experience in public administration, federal grant management, and land-use policies. Jonathan has provided administration on community and economic development projects including code enforcement, social service provision, neighborhood and urban revitalization, and transportation with budgets ranging from $500,000 to $111 million. His areas of expertise include planning, zoning, and land use policies, affordable housing policies and best practices, creating public-private partnerships to promote affordable housing and community development, and implementation of "green" and energy efficient programs and policies.

City Administrator, Surry County, Virginia 2017 – 2019

- Responsible for development and oversight of annual budget and work programs designed to implement the legislative policies and priorities of the Board of Supervisors.
- Serve as the point of contact for all City matters for each Department, elected constitutional officers, and public inquiries.
- Manage over 100 employees and a $52 million annual operating budget that also included Surry City School System and the Department of Social Services.
- Implemented a work group among various agencies that provides a coalition within the City to increase services for Mental Health clients.
- Increased collaboration efforts with rural power cooperative to provide broadband access to underserved locations throughout the County.
- Fostered the creation of communication and outreach programs in underserved portions of the County.

Town Manager, Town of Tyrone, Georgia, 2017 – 2018

- Initiated organizational Five-Year Strategic Plan establishing annual Policy and Management Priorities including a comprehensive Action Item Agenda and reporting format.

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

- Established comprehensive Annual Budget Calendar/Process providing specific direction to departments and a written recommended balanced budget to the Mayor and Town Council
- Responsible for implementation of new Legislative/Agenda Management initiatives for increasing municipal transparency
- Completed comprehensive evaluation of Solid Waste Collection Services – resulting in increased revenues through lowering rates and maintaining all staff levels.

Community and Development Services Director, City of Douglasville, Georgia, 2015 – 2017

- Responsible for management and oversight of the City's Community Redevelopment Agency including the agency's tax increment financing funds and public projects funded by bond revenues Provided executive level leadership by assisting City Manager in directing the operations of a diverse urban City with roughly 300 employees and total budget of approximately $30 million.
- Provided direct oversight of Planning, Zoning, Inspections, Permitting, Development Services, Tourism, Community Development, Economic Development, Main Street, a Regional Welcome Center, and a 37,000 square foot Conference Center
- Initiated a new downtown planning effort to spur revitalization and visioning for the Downtown Douglasville area, including redevelopment of a 10-acre site previously used as a City jail facility
- Established a Community Constituency Group with the local building and real estate industry to evaluate and provide feedback on the City's building permit process
- Oversaw large state-funded transportation projects for the City with budgets ranging from $600,000 to a comprehensive road realignment project with a budget of $111 million
- Utilized a consensus approach methodology with all division heads to develop vision and mission statements and created SOPs for the entire department

Affordable Housing Manager & Research Consultant, WFN Consulting, Inc., 2012 – 2015

- Managed the entire affordable housing grant portfolio for Cobb County, GA and its approximately 700,000 residents Served as project manager for property acquisition,

construction, and housing rehabilitation projects funded through federal housing programs
- Conducted comprehensive land use and zoning analysis for planning engagement projects throughout United States
- Lead citizen engagement efforts on various projects including kick-off meetings, community input forums, and charrette style agency meetings
- Responsible for structuring public-private collaboration efforts to build senior living complex in Marietta, GA, which provided for affordable rent limits on public funding while maintaining market rate rental units, which resulted in a $30 million finished project.
- Solicited efforts to utilize Habitat for Humanity to take over a failed development when the developer ceased operations. Through this collaboration, Habitat was able to construct a full residential subdivision with new homes and 100% sold during construction in 2012-2013
- Developed solar programming component for WFN that provided an alternative revenue stream for the company and integrated efforts to reduce homeownership costs for residential units under construction.
- Created and served as the project director for the land-use planning division of WFN

Planning and Zoning Manager, City of Tybee Island, Georgia, 2009 – 2011. Planning and Zoning Manager 2009 – 2011

- Supervised all staff members in the Planning and Zoning Department and included responsibility of Planning, Zoning, Community Development, Economic Development, Main Street Program, Inspections, Permitting, Business Licenses, and GIS
- Developed strategies to ensure that Tybee would encourage economic development on the island while protecting the current built environment, including all issues related to the permanent resource carrying capacity
- Handled all departmental presentations to the Mayor and Council regarding ordinance revisions, sign permits, subdivision regulations, GIS Projects, and all other pertinent land-use matters
- Served as the city's representative on the regional planning organization's planning and transportation planning committee.

- Served as the acting City Manager during the manager's absence. *Accomplishments*
- Formed the Bicycle and Pedestrian Committee and received a "Bike Friendly" designation for the City of Tybee Island (2009-2010)
- Completed a rewrite of the entirety of the City's Sign Ordinance that included environmental protections for endangered wildlife while protecting the Island's unique character (2009)
- Collaborated with the City's Emergency Management staff to draft and participate in the "Hurricane Gilligan" exercise for hurricane preparedness (2010)
- Coordinated and implemented a wayfinding signage program for the island, which was completed through agency input and engaging local businesses to determine appropriate island destinations.
- Received and managed Energy Efficiency Conservation Block Grant [EECBG] to reduce overall energy consumption through municipal buildings

Community Improvement Director, City of Waycross, Georgia, 2007 – 2009 Community Improvement Director 2007 – 2009

- Supervised all staff members in the Planning and Zoning Department and included responsibility of Planning, Zoning, Community Development, Economic Development, Main Street Program, Inspections, Permitting, Business Licenses, and GIS
- Restored the City to compliant status with the CHIP program after formulating an expenditure plan to provide over $600,000 in homeowner rehabilitation and down payment assistance funds.
- Leveraged over $1 million on local contributions for a $500,000 Community Development Block Grant to begin a neighborhood revitalization project that included demolition of a dilapidated school and construction of a community multi-purpose facility.
- Created and implemented a neighborhood blitz campaign to assist code enforcement efforts with a 50% reduction through homeowner abatement.

Supervised the Housing and Community Development Department.

- Provided technical assistance to grant sub-recipients to improve compliance with federal and state regulations and improve service delivery models.
- Managed CDBG programming including completion of environmental reviews, the implementation of a pilot affordable housing program, and neighborhood stabilization programs.
- Conducted studies and implemented action planning regarding neighborhood revitalization and stabilization, slum and blight reduction, and community redevelopment.

EDUCATION

University of Tennessee, Knoxville Bachelor of Arts and Sciences in Economics

University of Memphis
Master of Science in Finance

SPECIALTIES

- Economic Policy
- Finance Housing
- Market Analysis
- Rental Marketing Analysis



Jason Wright
1(844)855-5580
jason@achrysaliscommunity.com

Jason Wright is a Senior Consultant and policy analyst with over 15 years of experience in banking, accounting, finance, property management, and real estate. . He is skilled at conducting rental and housing market analyses and the development of marketing and surveying tools for the financial and real estate sectors

Jason has expertise in financial and economic policy. He has experience in budgeting, and revenue generation through procurement, costs reduction initiatives, and building partnerships to promote investments. He has worked with businesses and nonprofits to increase development through strategic planning, managing budgets and portfolios, and implementation of cost control policies and procedures. He has over five years of experience in the banking and finance fields with extensive experience in lending and credit practices with specializations in the mortgage, small business, real estate, construction, retail, and healthcare industries.

Senior Property Specialist/Rental Property Analyst, Renter Locators, LLC, Atlanta, GA August 2016-Present

- Developed relationships with apartment managers, leasing agents, property specialists, real estate agents, and local businesses to determine rental market needs. Procured sales and resident referral contracts with over 100 apartment communities. Managed sales force of 5-10 Property Specialists. Responsible for "shopping" residential properties. Developed and maintained a resident referral and retention program. Responsible for leasing apartments, telephone inquiries, developing and greeting prospects, touring apartments, facilitating applications and deposits, verifying information, and follow-up of all prospects. Conducted marketing surveys, developed marketing materials, and implemented marketing strategies based on survey analysis. Maintained contract obligations with apartment communities and real estate agencies.

Property Specialist, Promove, LLC, January 2015-June 2016

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

- Responsible for procuring and maintaining resident leads for over 600 apartment communities. Responsible for leasing apartments, telephone inquiries, developing and greeting prospects, touring apartments, facilitating applications and deposits, verifying information, and follow-up of all prospects Implemented marketing strategies to match property amenities to prospective client needs. Responsible for ensuring monthly, quarterly, and annual leasing goals are met or exceeded**.**

Finance Manager, Security Nationals Protective Services, LLC, August 2009-December 2015 Washington, D.C.

- Prepared financial statements, maintained cash controls, prepared payroll, maintained accounts payable, and managed office operations. Responsibility for personnel management for a team of 10-25 sales professionals. Provided supervision and training and ultimately responsible for staff completion of financial and sales goals. Performed financial market analysis to set sales goals and ensure appropriate pricing of products. Utilized analysis to prepare and present finance reports detailing trends in sales, costs, and annual fiscal projections to management and board of directors. Coordinated with marketing staff to set and implement marketing goals, strategies, and plans.

Accountant, James Wright, CPA, January 2010-July 2014, Memphis, TN

- Performed financial market analysis to increase profitability by ensuring strategic pricing and sales goals. Prepared financial reports detailing market trends in sales, costs, and profits. Sold accounting services and developed marketing plan to sale accounting services. Conducted internal and external audits. Consulted with clients on pricing, billing, general ledgers, account reconciliation, and profits to improve agency efficiency and profitability. Consulted with client on development of business and marketing plans to improve on profitability and secure external financing.

Branch Sales Manager, Bank of America, April 2006-August 2009 Memphis, TN

- Implemented sales strategies and marketing techniques that generated new customers and business. Handled questions and provided outstanding customer service, regarding new

accounts, billing, complaints, account activation, and closed accounts.

- *Received Award of Excellence in 2007.*
- *First place Sales Associate in region for Quarters 1 & 3 and second place Sales Associate in region for Quarter 4.*
- *Banking Center was in the top 1% of All Bank of Americas in the county.*

Personal Banker, Union Planters Bank, December 2003-March 2006, Memphis, TN

- Analyzed customer financial needs and credit to determine and recommend financial services and financial management plans. Acted as liaison to help customers complete all requirements and secure needed financial services including loans and credit lines. Provided excellent customer service and assistance to help customers with account maintenance and debt consolidation plans.

Financial Advisor, Waddell & Reed Financial Services, February 2002-May 2003

- Performed detailed analysis of market to develop sales strategies and goals. Implemented marketing strategies to successfully exceed sales targets. Maintained a consistent awareness of the competition as well as developments in the finance industry.



Michelle Sherrill
1(844)855-5580
Michelle@achrysaliscommunity.com

EDUCATION

Indiana University School of Social Work, Indianapolis, IN 2002, MA Social Work

Indiana University School of Social Work, Indianapolis, IN 2000, BA Social Work

SPECIALITIES

- Community Needs Assessment
- Homelessness Prevention
- Social Service Administration

Michelle Sherrill is a skilled research analyst with expertise the in social science economic development, social policy, and health research sectors. She has worked extensively in the fields of community economic development, work force development, mental health, research, academia, and non-profit management. Her specializations include public service and nonprofit administration, youth labor force development, and health and educational disparities. Her background in research includes performing qualitative and quantitative evaluation for private and public sector clients including SWOT analysis, community revitalization plans, technical assistance to federal grantees, project management for federal grants, and legislative consultation on health, education, and economic development. Michelle's research experience includes the impact public policy on mental health services, health outcomes, and educational disparities.

Health Systems Coordinator, Lakeside Behavioral Health System, Memphis, TN. 2014 – 2019

- Facilitated Medicare, Medicaid, HMO, and private insurance requirements with applicable admission criteria and policies. Coordinated with physicians, nurses, patient, social service agencies, key stakeholders, referral sources, insurance companies, staff, state, and federal entities.
- Monitored adherence to federal and state Joint Commission, Medicaid, Medicare, and private insurance outcomes and policies. Provided training and professional development to the staff regarding procedures for the delivery of services.

Union University, Director of Internships/ Assistant Professor, Memphis, TN, 2011 – 2014

- Provided administrative and curriculum oversight of the Social Work field and internship Program. Assist in the design, development and implementation of assessment plan, including observation of stakeholder competencies, field education evaluations, and other best practice assessment tools; continuously research the literature to ensure best practices are applied in all aspects of field education.

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

- Meet with agency CEO's and other appropriate agency personnel to strengthen partnerships and help in the design of best practice learning experiences for students.

Resources for Human Development (RHD) Director, Memphis, TN 2009 – 2011

- Planned program growth and development, including special projects, analysis trends in program services, training staff and clients, and assisting in representing the program to networks of service providers.
- Monitored and adhered to state, licensure, federal applicable entities policies, contracts, procedures, outcome measurements, and future program goals. Performed presentations and training workshops to community stakeholders. Prepared and submitted annual grants and program outcomes, reports on the achievement of goals and outcomes.

Catholic Charities Inc. / Director of Homeless Services, Memphis, TN , 2006 – 2009

- Responsibilities included supervising compliance contracts cross functionally; program development for the Housing Choice Programs and HUD/Tax Credit conventional family shelters/properties. Analyzed trends in program services, training staff and clients, and assisting in representing the program to networks of service providers.
- Developed and supervised budgets in excess of $ 2 million, administered program expenditures, and evaluated options to maximize fiscal resources. Managed compliance with standards mandated by both state and federal regulations and contracts.
- Partnered with the legal enforcement, Section 8, and other community-based agencies to ensure clients received enhanced care. Monitored and adhered to
- HUD, maternity licensure, and other applicable entities policies and procedures. Reviewed state policies and procedures, outcome measurements, and future program goals.

Porter-Leath Children's Center, Program Supervisor, Memphis, TN, 2004 – 2006

- Supervised a child mental health and development program. Conducted project management including special projects, analysis trends in program services, training staff and clients,

and assisting in representing the program to networks of service providers.

IPS Day Adult High School/Goodwill Industries Indianapolis, IN 2002 – 2004 *Counselor/Coordinator*

- Responsibilities included overseeing compliance of WIA youth contracts cross functionally; proposal development; supervising program participants; planning program growth and development, including special projects, analysis trends in program services, training students, and assisting in representing the program to networks of service providers, and coalitions dealing with human services.
- Assisted youth and families in exploring career paths and assisted in overseeing a Career Exploration Program. Facilitated participation in Individual Program Plans (IPP) for more than 100 clients to help to determine best service plans for the clients.

EDUCATION

Howard University,
Washington, DC, May 2016, BBA. Finance

Harvard Business School,
Cambridge, MA Externship Summer 2015, Summer Venture in Management Program

HONORS AND AWARDS

Peace Corps Panama, Leadership Award 2018

Howard University School of Business Executive Leadership Honors Program (VP 2015-2016)

Mecca Luster, Consultant
1(844)855-5580
Mecca@AChrysalisCommunity.com



Mecca is a policy analyst and consultant with a specialization in fiscal policy analysis, economic development, workforce development, and small business advisement and growth strategies. She has worked as an advisor to small business aiding in the development of partnerships to develop small business incubators and financial resources and providing training and technical support related to financial and project management. She is skilled in grant procurement, administration, reporting, and technical writing. Her areas of interest include small business development, workforce development, and the enhancement of entrepreneurship and microenterprise for women. Mecca is highly experienced in public outreach for disparate populations and is fluent in Spanish.

EnCompass LLC, New Business Development Assistant, Rockville, MD 2018 – 2019

- Leading the migration and establishing new processes for the BD department to migrate from a legacy server to Sharepoint.
- Developed a detailed migration plan including creating training videos, SOPs, strategic timelines, and serving as the primary point of reference for my department Recognized as a leader and early adapter of SharePoint and offered support to the project team leading the company-wide migration
- Coordinating across departments to ensure that company-wide knowledge management is consistent and up to date.

Milken Institute, Research Associate-Independent Contractor, Washington, D.C., 2018

- Conducted economic research designed to improve community economic development and job growth efforts through report scouring, data analysis, and data entry.
- Prepared briefing books for executive staff review.

United States Peace Corps, *Business Advisor* (agriculture-focused), Darien, Panama, 2016 – 2018

- Worked closely with local agencies and nonprofits to offer consulting services focused on the indigenous communities.
- Proposed and managed two grant projects including creating and managing a team, budget forecasting, budget variance reports, and contract close-out to build a multisport court and a community office Trained 54 community members in accounting principles, small business management, and project management.
- Advised a community bank with over 60 members and trained the leaders to manage assets. Provided consulting services to two tourism groups on how to effectively market their services and price their goods Created and improved financial systems for the tourism groups, community bank, and community government.

Volunteer, Advisory Council, *Treasurer*, Panama, 2017 – 2018

- Built a team and led the analysis of the volunteer living allowance data and later offered a proposal which resulted in a 10% allowance increase for all volunteers Elected to serve as an advisor to the executive staff to ensure that volunteer needs were being met.
- Created various systems for volunteers in the future to request an increase in the overall volunteer living allowance, to manage funds, and to manage merchandise transparently.

- Chaired the logistics for multiple volunteer events, including managing the budget, volunteer funds, and communicating with service providers for over 150 volunteers.

J.P. Morgan Chase, *Financial Analyst,* New York City, New York, 2015-2017

- Supported the IB business unit using quantitative analysis to provide end-to-end financial management to business leaders .
- Simplified complex data sets to analyze variances in expenses over time to explain to business leaders ▪ Assisted in the development of an income statement tracker to ensure accuracy among data sources.

Eli Lilly, *Finance Analyst,* Indianapolis, IN, 2014

- Supported a sales unit by customizing reports to send to brand leaders using SAP Business Objects to help guide business decisions.
- Participated in a case study and analyzed the financial risk of new molecules in research and development

PROJECT COSTS

For the performance of the scope of services detailed herein, Chrysalis proposes a firm fixed price inclusive of all costs associated with the project. Specifically, Chrysalis's fixed price includes cost of staff to oversee, manage, and perform the specified services, cost of office supplies, and the costs to prepare, print, and bind the final product.

Chrysalis proposes a $65,000.00 fixed-firm price, not-to-exceed fee for the research and with the preparation of the Consolidated Plan, Action Plan and Affirmatively Furthering Fair Housing for the City of Council Bluffs

Consolidated Plan, Action Plan and Affirmatively Furthering Fair Housing for the City of Council Bluffs	
Personnel Costs	
Community Input and Data Collection, travel cost	$4,000
Consolidated Plan, Action Plan and Affirmatively Furthering Fair Housing for the City of Council Bluffs	$50,750
Phase 2: Presentation & Approval of Documents	$3,800
Subtotal	**$58,550**
Occupational Cost	
Kick-off meeting and community tour	$500
Community workshops and one-on-one interviews	$3,600
Presentation of draft	$500
Public hearing	$500
Subtotal	**$5,100**
Printing / Report Production	
Production of final documents; transcripts, copies of surveys, meetings minutes	$600
Proofreading, Copyediting, and Substantive editing	$750
Subtotal	**$1350**
Total Proposed Project Fee	**$65,000.00**

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

REFERENCES

Chrysalis Research & Consulting staff conducted fair housing studies and to other housing and community and economic development related studies are provided below. Note that principals completed this work while employed together at WFN Consulting or with other entities.

WAUKESHA COUNTY, WISCONSIN

Project included the completion of a six-month projecting including an Analysis of Impediments to Fair Housing Choice, Consolidated Plan, and Annual Action Plan. Public outreach involved six public meetings, stakeholder input from 56 organizations, and community survey administration and data analysis with 383 respondents. The study included a protected class analysis, an examination of housing affordability, assessments of public and private sector policies and practices, identification of impediments to fair housing choice, and recommendations to address barriers.

Contact: Kristin Silva, Community Development Coordinator
Waukesha County Department of Parks and Land Use
515 W. Moreland Blvd., Room AC 320, Waukesha, WI 53188
ksilva@waukeshacounty.gov – (262) 896-3370

ST. LOUIS COUNTY and the CITIES of FLORISSANT and O'FALLON, MISSOURI

Services included completion of completion of a six-month project including an Analysis of Impediments to Fair Housing Choice covering each of the three jurisdictions. The process involved five community meetings, 30 stakeholder interviews, a survey with 57 respondents, and three public hearings. Key components of the study included an analysis of protected classes, an examination of housing stock and affordability, a review of local zoning ordinances, assessments of other public and private sector policies and practices, identification of impediments to fair housing choice, and recommended strategies for addressing barriers.

Contact: Jim Holtzman, Director
St. Louis County Office of Community Development
41 S. Central, 5th Floor, Clayton, Missouri 63105
JHoltzman2@stlouisco.com – (314) 615-4414

COUNTY of SAN BERNARDINO, CALIFORNIA

Services included completion of an 8-month project including an Analysis of Impediments to Fair Housing Choice,
Consolidated Plan, and Annual Action Plan. Mosaic principals performed community engagement, public outreach, and designed and implemented a community survey. These activities focused on identifying priority community development, economic development, and fair and affordable

Housing Plan and an update to Consolidated Plan, Action Plan and Affirmatively Furthering Housing for the City of Council Bluffs

housing needs, and then developing strategies and programs to address them over a five-year timeframe. Over 800 residents completed the survey, 14 organizations participated in interviews, and the team held 6 community meetings.

The Analysis of Impediments included a protected class analysis, an examination of housing affordability, assessments of public and private sector policies and practices, identification of impediments to fair housing choice, and recommendations to address barriers.

Contact: Debbie Kamarani, Deputy Director
County of San Bernardino Community Development and Housing
Department
385 N. Arrowhead Avenue, 3rd Floor, San Bernardino, CA 92415
dkamarnai@cd.sbcounty.gov – (909) 387-4327

CITY of EAST ORANGE, NEW JERSEY

Services included completion of a Consolidated Plan 2021-2025 and Actions Plans for 2020 and 2021 covering the housing goals of the jurisdiction. The process involved multiple virtual community meetings, 25 stakeholder interviews, a survey with 153 respondents, and one public hearings. Key components of the study included an analysis of protected classes, an examination of housing stock and affordability.

Contact: Tiffany Delany, Director
East Orange Office of Policy, Assistant Director | Office of Policy, Planning and
44 City Hall Plaza, East Orange, NJ 07018
Tiffany.Harris-Delaney@eastorange.com – (908)380-2087


CHRYSALIS
RESEARCH + CONSULTING, LLC



CD 2022 - 18

Housing Plan and Updates to the Consolidated Plan, Action Plan and Affirmatively Furthering Fair Housing

Issue Date: 10/26/2022
Questions Deadline: 11/7/2022 04:00 PM (CT)
Response Deadline: 11/15/2022 12:00 PM (CT)

Contact Information

Address: Community Development
209 Pearl St
Council Bluffs, IA 51503

Event Information

Number:	CD 2022 - 18
Title:	Housing Plan and Updates to the Consolidated Plan, Action Plan and Affirmatively Furthering Fair Housing
Type:	Request for Proposal
Issue Date:	10/26/2022
Question Deadline:	11/7/2022 04:00 PM (CT)
Response Deadline:	11/15/2022 12:00 PM (CT)
Notes:	

The City of Council Bluffs Community Development Department is requesting proposals from qualified Consultants to create a Housing Plan and to update the City of Council Bluffs' Consolidated Plan, Action Plan and Affirmatively Furthering Fair Housing (AFFH).

The City of Council Bluffs will accept electronic bid submittals in IonWave until the date and time listed for this solicitation. Hard copy bid submittals are not acceptable and will not be considered. Any bid submitted after the deadline will be automatically rejected.

Each respondent is responsible for taking the necessary steps to ensure their submission is received and complete by the listed deadline. Incomplete submissions are automatically rejected. The City is not responsible for technical difficulties and will not allow late submissions due to the same.

The bid will be administered and overseen by the Community Development Department.

All questions are to be submitted through IonWave.

Ship To Information

Address: Community Development
209 Pearl St
Council Bluffs, IA 51503

Billing Information

Address: Community Development
209 Pearl St
Council Bluffs, IA 51503

Bid Attachments

Request of Proposal_FINAL.pdf

Download

Request for Proposal

Requested Attachments

Proposal

(Attachment required)

Please upload submitted proposal as one document.

Bid Attributes

1 Proposal Acknowledgement

I hereby certify that I have reviewed the RFP in its entirety and accept the terms and conditions.

☒ 0

(Required: Check all that apply)

2 Required Contract Language

REQUIRED CONTRACT LANGUAGE

All project contracts shall contain at a minimum the following provisions, as appropriate. ALL CONTRACTS

1.Access and Maintenance of Records

The contractor must maintain all required records for five years after final payments are made and all other pending matters are closed.

At any time during normal business hours and as frequently as is deemed necessary, the contractor shall make available to the City of Council Bluffs, the State Auditor, the General Accounting Office, and the Department of Housing and Urban Development, for their examination, all of its records pertaining to all matters covered by this contract and permit these agencies to audit, examine, make excerpts or transcripts from such records, contract, invoices, payrolls, personnel records, conditions of employment, and all other matters covered by this contract.

2.Civil Rights

The Contractor must comply with the following laws and regulations:

·Title VI of the Civil Rights Act of 1964 (P.L. 88-352).

States that no person may be excluded from participation in, denied the benefits of, or subjected to discrimination under any program or activity receiving Federal financial assistance on the basis of race, color, or national origin.

·Title VIII of the Civil Rights Act of 1968 (Fair Housing Act), as amended.

·Iowa Civil Rights Act of 1965. This Act mirrors the Federal Civil Rights Act.

·Section 109 of Title I of the Housing and Community Development Act of 1974, as amended (42 U.S.C. 5309).

Provides that no person shall be excluded from participation in, denied the benefits of, or subjected to discrimination on the basis of race, color, national origin, sex, age, or handicap under any program or activity funded in part or in whole under Title I of the Act.

·The Age Discrimination Act of 1975, as amended (42 U.S.C. 1601 et seq.)

Provides that no person on the basis of age, be excluded from participation in, be denied the benefits of or be subjected to discrimination under any program or activity receiving Federal financial assistance.

·Section 504 of the Rehabilitation Act of 1973, as amended (P.L. 93-112, 29 U.S.C. 794).

Provides that no otherwise qualified individual shall solely by reason of his/her handicap be excluded from participation in, be denied the benefits of, or be discriminated against under any program or activity receiving Federal financial assistance.

·Americans with Disabilities Act (P.L. 101-336, 42 U.S.C. 12101-12213)

Provides comprehensive civil rights to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.

·Section 3 of the Housing and Urban Development Act of 1968, as amended (12 U.S.C. 1701u).

Provides to the greatest extent feasible, that training and employment opportunities be made available to lower-income residents of project areas and that contracts be awarded to small businesses located within the project area or owned in substantial part by project area residents.

·Federal Executive Order 11246, as amended by Executive Order 11375. Provides that no one be discriminated in employment.

·Federal Executive Order 11063, as amended by Executive Order 12259.

3.Termination Clause

All contracts utilizing CDBG funds must contain a termination clause that specifies the following:

·Under what conditions the clause may be imposed.

·The form the termination notice must take (e.g., certified letter).

·The time frame required between the notice of termination and its effective date.

·The method used to compute the final payment(s) to the contractor.

4.Certification regarding government-wide restriction on lobbying.

All contracts utilizing CDBG funds must contain the following certification concerning restriction of lobbying:

"The Recipient certifies, to the best of his or her knowledge and belief, that:

i.No Federal appropriated funds have been paid or will be paid, by or on behalf of the Recipient, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

ii.If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee, or an employee of a Member of congress in connection with this Federal contract, grant, loan, or cooperative agreement, the Recipient shall complete and submit Standard Form-LLL, "Disclosure Form to Report Federal Lobbying" in accordance with its instruction.

iii.The Recipient shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure."

5.Lead-Safe Housing Regulations (As applicable)

24 CFR Part 35 et. al.

Requirements for Notification, Evaluation and Reduction of Lead-Based Paint Hazards in Federally Owned Residential Properties and Housing Receiving Federal Assistance, Final Rule

6.Standards and Policies Relating to Energy Efficiency

Pub. L. 94-163, 89 Stat. 871

Mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

7.Notice of Awarding Agency Requirements and Regulations Pertaining to Reporting

The Contractor must provide information as necessary and as requested by the City of Council Bluffs for the purpose of fulfilling all reporting requirements related to the CDBG program.

ALL CONTRACTS IN EXCESS OF $10,000

In addition to the preceding provisions, all contracts in excess of $10,000 must include the following language, pursuant to Federal Executive Orders 11246 and 11375:

"During the performance of this contract, the contractor agrees as follows:

1)The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.

2)The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin.

3)The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or workers' representative of the contractor's commitments under Section 202 of the Executive Order No. 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

4)The contractor will comply with all provisions of Executive Order No. 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

5)The contractor will furnish all information and reports required by Executive Order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

6)In the event of the contractor's non-compliance with the nondiscrimination clause of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

7)The contractor will include the provisions of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance: Provided, however, that in the event the contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

ALL CONTRACTS IN EXCESS OF $100,000

In addition to the preceding provisions, contracts in excess of $100,000 shall require compliance with the following laws and regulations:

Section 306 of the Clean Air Acts (42 U.S.C. 1857(h)).

Section 508 of the Clean Water Act (33 U.S.C. 1368).

Executive Order 11738.

EPA Regulations - 40 CFR, Part 15.

Clean Air and Water Acts - required clauses:

This clause is required in all third party contracts involving projects subject to the Clean Air Act (42 U.S.C. 1857 et seq.), the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), and the regulations of the Environmental Protection Agency with respect to 40 CFR Part 15, as amended. It should also be mentioned in the bid document.

During the performance of this contract, the CONTRACTOR agrees as follows:

1)The CONTRACTOR will certify that any facility to be utilized in the performance of any nonexempt contract or subcontract is not listed on the Excluded Party Listing System pursuant to 40 CFR 32.

2)The CONTRACTOR agrees to comply with all the requirements of Section 114 of the Clean Air Act, as amended, (42 U.S.C. 1857c-8) and Section 308 of the Federal Water Pollution Control Act, as amended (33 U.S.C. 1318) relating to inspection, monitoring, entry, reports, and information, as well as all other requirements specified in said Section 114 and Section 308, and all regulations and guidelines issued thereunder.

3)The CONTRACTOR agrees that as a condition for the award of the contract, prompt notice will be given of any notification received from the Director, Office of Federal Activities, Environmental Protection Agency, indicating that a facility utilized or to be utilized for the contract is under consideration to be listed on the Excluded Party Listing System.

4)The CONTRACTOR agrees that it will include or cause to be included the criteria and requirements in Paragraph (1) through (4) of this section in every nonexempt subcontract and require every subcontractor to take such action as the Government may direct as a means of enforcing such provisions.

ALL CONSTRUCTION CONTRACTS IN EXCESS OF $2,000

In addition to the preceding provisions, all construction contracts in excess of $2,000 must include the Federal Labor Standards Provisions (verbatim) found in Appendix 2 under Required Contract Provisions. (Housing rehabilitation contracts of less than 8 units are excluded from this requirement.)

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(Required: Check all that apply)

Supplier Information

Company Name: Chrysalis Research & Consulting LL

Contact Name: Jason Wright

Address: 1201 West Peach Tree Street NW Atlanta, GA 30309 Suite 2300

Phone: 404-640-4156

Fax:

Email: Jason@thechrysalisconsultants.com

Supplier Notes

By submitting your response, you certify that you are authorized to represent and bind your company.

Jason Wright
Print Name

Signature