

**VIVA CONSULTING: STRATEGIC/BUSINESS PLANNING, TRAINING and RECRUITMENT**

**STRATEGIC AND BUSINESS PLANNING: ORGANIZATIONAL DESIGN CONSULTING**

Client Name/Location/Dates	Viva Principal(s)	Description
<b>Department of Housing Preservation &amp; Development</b> New York, NY 2007-2008	All	Assessed the capacity of multiple New York organizations to perform tasks (development, property management, asset management, providing funding, legislative advocacy) in order to create an organizational strategy for the City to preserve affordable housing with expiring use restrictions.
<b>Boston Housing Authority</b> Boston, MA 2007-2008	Gilbert & Gould	Performed a feasibility analysis concerning an assisted living facility or other interventions to support frail elderly in BHA housing. The analysis included a best practices study of Boston-area ALFs, resident needs assessment and financial modeling.
<b>Chelsea Neighborhood Housing Services</b> Chelsea, MA 2007-2008	Gould & Elving	Developed business plan and financial model for addressing foreclosures and disinvestment in a low-income urban community, using a range of financing tools including New Markets Tax Credits to spur investment in rental and ownership housing
<b>University of Massachusetts: Boston</b> Boston, MA 2007-2008	Elving, Gilbert & Gould	Conducted research on university/private collaborations to create student housing; assessed development options including public/private equity financing for use in potential university development projects.
<b>Hudson Housing Capital</b> New York, NY 2007-2008	Gould	Collaborated on development of a business plan for an equity investment fund for infill real estate development in urban markets. Fund is a joint venture between a private equity investment firm and a non-profit community development lender.
<b>Corporation for Supportive Housing</b> New Haven, CT 2008	Gould & Weber	Conducted longitudinal operating cost analysis of CSH's housing projects in Connecticut, comparing the results to original proforma assumptions and identifying key variances.
<b>Casa Myrna Vazquez</b> Boston, MA 2008	Elving & Gould	Performed organizational assessment for domestic violence support and prevention group. Project included recommendations for organizational structure and optimizing board/staff interactions.
<b>Cindy's Kitchen (with Massachusetts Housing Partnership)</b> Brockton, MA 2007-2008	Gilbert	Assessed options for a manufacturer seeking to assist its low-wage workers to become homeowners. Scenarios analyzed included developing a single site of housing, acquiring scattered sites and providing a subsidy to buyers.
<b>Lena Park CDC</b> Boston, MA 2007	Gilbert & Gould	Performed a business line assessment on the financial performance of a community organization providing housing, child care, youth development and job training.

<b>Cambridge Housing Authority</b> Cambridge, MA 2006-2007	Gilbert & Gould	Assessed options for redevelopment of CHA's state and federal public housing portfolios, including site assessments, financial modeling to allow analysis of redevelopment scenarios by project and across the portfolio and presentations to CHA staff and Board on the range of options available for redevelopment. Designed and facilitated a day-long summit for 30 stakeholders to discuss redevelopment strategies including an interactive game, SimPublicHousing.
<b>NHSGN</b> Nashua, New Hampshire 2007	Gilbert & Gould	Prepared a five-year strategic plan.
<b>CATCH Neighborhood Housing</b> Concord, New Hampshire 2007	Elving	Developed a strategic plan.
<b>NeighborWorks® Greater Manchester</b> Manchester, NH 2007	Gould	Developed a strategic plan.
<b>HRI / Cambridge Neighborhood Apartment Housing Services</b> Cambridge, MA 2007	Gould	Developed an organizational operating plan.
<b>Codman Square Housing Development Corporation</b> Boston, MA 2007	Elving	Created a business plan to expand programs and support for homeowners, including lending, education, foreclosure intervention and prevention. Also, developed an organizational operating plan.
<b>NeighborWorks® Alliance of Vermont: VT Homeownership Centers</b> Burlington, VT 2007	Elving & Gould	Surveyed and analyzed the costs incurred by five Vermont homeownership centers in making various types of loans to homeowners.
<b>Volunteers of America</b> Washington, DC and National 2004-2008	All	Various projects, including development of national and local strategic and business plans for real estate development and property management; general business planning for affiliates.
<b>SOME (So Others Might Eat)</b> Washington, DC 2006-2007	Gould & Weber	Conducted an assessment and business planning of organizational capacity for real estate development, property management and asset management.
<b>Mutual Housing of South Central Connecticut</b> New Haven, CT 2006	Gilbert & Gould	Assessed the environment for potential expansion of affordable housing development program into an adjacent county.

<b>Bay Area LISC</b> San Francisco, CA 2006	Gould & Weber	Designed and implemented regional study of property management best practices, challenges, and policy recommendations. Report published by LISC in 2006.
<b>Enterprise Community Investment</b> 2005-2006	Gilbert	Performed site assessments for projects in New York and Vermont for potential tax credit investments by Enterprise's funds.
<b>HAP, Inc.</b> Springfield, MA 2005-2006	All	Various projects, including strategic planning process for real estate development and property management departments of regional housing organization; re-design of organizational development for entire agency.
<b>North Shore Housing Trust</b> Newburyport, MA 2005-2006	Gilbert & Gould	Evaluated feasibility of and demand for three potential business lines.
<b>Valley Community Development Corporation</b> Northampton, MA 2005-2006	Gilbert & Gould	Developed a strategic plan.
<b>Laconia Area Community Land Trust</b> Laconia, NH 2005	Gould & Weber	Developed an operational plan with financial model.
<b>MHA of Greater Hartford</b> Hartford, CT 2005	Gould & Weber	Developed an operational plan with financial model.
<b>Affordable Housing, Education and Development (AHEAD)</b> Littleton, NH 2005	Gould & Weber	Developed an operational plan with financial model.
<b>Neighborhood Housing Services of Greater Nashua</b> Nashua, NH 2005	Gilbert & Gould	Developed an operational plan with financial model.
<b>The Housing Partnership Network</b> Boston, MA 2004-2005	Gould & Weber	Part of research team with the Urban Institute, Rachel Bratt and Bill Ryan: Investigated unique organizational strategies and policy challenges of this 80+ member organization of regional affordable housing not-for-profits. Included in-depth case studies at eight organizations.
<b>The Housing Partnership</b> Portsmouth, NH 2004	Weber	Worked with Board of Directors to create position description in preparation for THP's recruiting new Executive Director.

<b>Concord Area Trust for Community Housing</b> Concord, NH 2004	Gilbert & Gould	Conducted feasibility study of three potential new strategic initiatives; developed business plan, including flexible financial model.
<b>Cambridge Housing Authority</b> Cambridge, MA 2003-2005	Gould & Weber Gilbert & Weber	Developed a plan for property management and asset management of the Housing Authority's non-public-housing portfolio. Evaluated operations at Neville Communities (an assisted living facility and nursing home) and made recommendations for more effective Board oversight.
<b>Neighborhood Reinvestment Corp.</b> Boston, MA 2003-2004	Gould & Weber	Conducted a survey of best practices in resident services and resident leadership, including eight community development non-profits across the country.
<b>Preservation of Affordable Housing</b> Boston, MA 2003-2004	Elving, Gould & Weber	Developed a business and operating plan for non-profit/private joint venture to engage in the acquisition and long-term stewardship of affordable rental properties across the country. Drafted operating plan for new construction oversight department.
<b>Metropolitan Boston Housing Partnership</b> Boston, MA 2003	Elving & Gilbert	Designed a housing assistance program for MBHP to implement that will improve the capacity of small landlords to provide good quality rental housing for Section 8 certificate holders in metropolitan Boston.
<b>Metropolitan Boston Housing Partnership</b> Boston, MA 2002	Elving	Conducted an assessment of MBHP's program and organizational strengths as perceived by other local housing organizations and leaders, with recommendations for improving its housing programs.
<b>Virginia Beach Community Development Corporation</b> Virginia Beach, VA 2002	Gilbert & Weber	Performed a benchmarking assessment of five housing organizations for a growing CDC seeking to improve its development and management of a diverse portfolio of rental and single family housing. The assessment compares organizations' operating practices, property management methods, development rules of thumb and revenue sources.
<b>Mercy Housing, Inc. (MHI)</b> Denver, CO 2001-2002	Gould & Weber	In a two-phased study sponsored by MHI, surveyed and facilitated a conference of seven of the country's pre-eminent not-for-profit developers and managers of affordable housing to review the findings. The survey documents and compares organizational design, work processes, performance standards and best practices across the organizations and is unique in the industry for its level of detail and completeness.
<b>Pine Street Inn</b> Boston, MA 2001-2002	Elving & Gould	Developed a strategy for PSI to preserve single-room occupancy housing throughout the greater Boston metropolitan area. Also conducted a survey of best practices in SRO housing development, based upon the work of other large, non-profit SRO owners throughout the country.

<b>Abt Associates Inc.</b> Boston, MA (for project in North Charleston, SC) 2002	Gilbert	Attended two day site assessment of the HOPE VI project in North Charleston, SC. Produced written report describing strengths and weakness of project plans with recommendations for technical assistance by HUD.
<b>Abt Associates, Inc.</b> Boston, MA 2002	Weber	Conducted research (including interviews) and wrote case study of Memphis HOPE VI project to determine how well actual operations are aligning with the mixed-income goals established in the project's closing documents. Designed asset management training for public housing asset managers.
<b>JER Hudson Housing Capital</b> New York, NY 2000-2002	Gould	Periodic consultation about strategy and business development. Facilitation of strategic and business planning sessions. Development and design of marketing materials.
<b>Codman Square Community Development Corporation</b> Boston, MA 2001; 2004-2005	Gould & Weber	Conducted organizational assessment, focusing on issues of organizational structure and design, communication, board/staff relations and board committee structure. Updated assessment. Developed an operational plan with financial model.
<b>Northern Community Management Corporation</b> St Johnsbury, VT 2001	Gould & Weber	Created a business plan that was preceded by a scan of the competitive environment, research into best practices in rural property management, and identification of options for improving NCMC's operations.
<b>Neighborhood Reinvestment Corporation</b> Boston, MA 2001	Gould & Weber	Conducted research in best practices in small property management organizations and co-authored Best Practices in Small and Rural Property Management Firms, published in NRC's spring 2002 edition of its quarterly publication Bright Ideas.
<b>Asian American Civic Association</b> Boston, MA 2001	Gould	Designed and analyzed bilingual client satisfaction survey (involving 200+ clients). Led strategic planning retreat for board and staff.
<b>The Community Builders</b> Boston, MA 2001	Gould	Developed and installed database tool (built in Access) for analyzing development project profitability and staff time allocations.
<b>Metropolitan Development and Housing Agency</b> Nashville, TN 2001	Gilbert	Conducted assessment of two HOPE VI programs for this redevelopment authority/public housing agency. Areas of assessment included the development program, community planning and relations, property management and relocation, finance/asset management/grant administration, and community and supportive services program.

<b>House of Hope</b> Lowell, MA 2000-2001	Gould	Developed strategic plan in collaboration with shelter staff and board. Plan preparation included research and statistical analysis of changes in shelter population over time as well as design, implementation and analysis of survey of past and current shelter guests.
<b>Asian Community Development Corporation</b> Boston, MA 2000	Gould	Developed strategic and business plan for the organization. Plan preparation included environmental scan and analysis, numerous interviews, facilitating several board retreats, and financial model of organization's future under several scenarios.
<b>New Economics for Women (NEW)</b> Los Angeles, CA 2000, 2005	Gould & Weber	Conducted organizational assessment and wrote report "Gearing Up for Growth" as this CDC confronted significant expansion. Report sponsored by JER Hudson Housing Capital. Conducted a second review five years later to discuss current operational challenges and opportunities.

### TRAINING, WORKSHOPS AND EDUCATION (ONE DAY OR MORE; SINCE 2000)

Client Name/Location/Dates	Viva Principal(s)	Description
<b>NeighborWorks® America, Local Initiatives Support Corp. and Enterprise Foundation</b> Nationally Since 2003	Gould & Weber	Co-developed curriculum; teach five-day course on "Advanced Asset Management" as part of the Consortium for Housing and Asset Management (CHAM) program.
<b>NeighborWorks® America and Institute of Real Estate Management (IREM)</b> Nationally Since 2003	Gould	Developed curriculum; teach three-day course on "Financial Tools for Asset Managers."
<b>NeighborWorks® America</b> Nationally Since 2007	Elving	Developed curriculum; teach specialized course in creative financing strategies, covering such topics as various types of tax credits and TIFs.
<b>NeighborWorks® America</b> Nationally Since 2002	Weber	Teach 5-day "Nonprofit Housing Management Specialist" ("NHMS") course as part of the Consortium for Housing and Asset Management (CHAM) program. Completely revised course in 2007.
<b>NeighborWorks® America</b> Multifamily Initiative Nationally Annually since 2001	Weber	Lead instructor for five-day Multifamily Initiative Asset Management Clinic. Revised curriculum for 2003 clinic. Created and teach MFI Portfolio Management class, since 2007.

<b>NeighborWorks America</b> Nationally Since 2008	Weber	Developed curriculum and teach two-day course: “Self Management vs. Third Party Contracting.”
<b>Various Locations</b> Massachusetts Since 2004	Gould	Teach customized courses in affordable housing finance, often with a focus on low-income housing tax credits, for non-profit developers.
<b>HUD Public and Indian Housing</b> Nationally Since 2006	Weber	Teach or act as “subject matter expert” with IREM and Bearing Point in multi-day regional trainings for public housing regional staff in public housing’s transition to asset-based management.
<b>Institute of Real Estate Management (IREM)</b> Greater Boston Chapter #4 Quincy, MA Annually since 1987	Weber	Teach IREM Course 201: “Successful On-Site Management,” a six-day exam course on best practices in the day-to-day management of residential property. Also teach 2-day MKL405 course: “Marketing and Leasing: Multifamily Properties” and ETH800 course: “Ethics for the Real Estate Manager.”
<b>Local Initiatives Support Corporation</b> New York, New York Regularly since 1996	Weber	Teach “Fundamentals of Asset Management” in one or two-day sessions to CDCs across the country. Sample cities include Philadelphia, Minneapolis/St Paul, Milwaukee, Phoenix, Washington, DC and Jamesburg, NJ. Also conduct multiple one-on-one sessions with individual CDCs in Minneapolis/St Paul & Duluth on variety of asset management topics. Work includes an updated asset management strategy for Twin Cities intermediaries.
<b>University of Pennsylvania</b> Philadelphia, PA 2004	Weber	Developed and taught “Marketing and Lease-Up” and “Property Management & Operations” to Center for Urban Redevelopment Excellence Fellows (Penn CUREX program).
<b>U. S. Department of Housing &amp; Urban Development</b> Multiple locations 2000-2002	Elving	Instructor in HOPE VI Regional Design Training institutes, focusing on real estate and financial issues in design of new communities.
<b>Lynn Housing Authority</b> Lynn, MA 2002	Elving	Developed and taught one-day course, introduction to Low Income Housing Tax Credits.
<b>The Community Builders</b> Boston, MA 2001	Elving	Organized and helped teach a pair of two-day workshops on the HOPE VI program and mixed-finance projects. One focused on operating issues and another on development & financing issues.
<b>Housing Authority of Baltimore City</b> Baltimore, MD 2001	Gilbert	Organized and co-taught one day training to project management staff on fundamentals of development and HOPE VI.

<b>Tufts University</b> Dept. of Urban and Environmental Policy Medford, MA 2000-2001	Gould	Developed and taught full-credit course in Real Estate Finance and Development for the Master's program in Urban and Environmental Policy.
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**REPRESENTATIVE EXPERIENCE: RECRUITMENT**

<b>Client Name/Location/Dates</b>	<b>Viva Principal(s)</b>	<b>Description</b>
<b>Chelsea Neighborhood Housing Services</b> Chelsea, MA 2006	Gilbert	Assisted in the recruitment of a new Director of Real Estate.
<b>HAP, Inc.</b> Springfield, MA 2006	Gilbert	Assisted in the recruitment of a new Director of Real Estate Development.
<b>Cambridge Housing Authority</b> Cambridge, MA 2004	Gilbert & Weber	Led recruitment effort for new Executive Director
<b>Mercy Housing, Inc.</b> Denver, CO 2002	All	Identified 12 qualified potential candidates for Midwest Regional President position based in Omaha. Completed assignment within two months.