

VIVA CONSULTING: STRATEGIC/BUSINESS PLANNING, TRAINING and RECRUITMENT

STRATEGIC AND BUSINESS PLANNING: ORGANIZATIONAL DESIGN CONSULTING

Client Name/Location/Dates	Viva Principal(s)	Description
Cambridge Housing Authority Cambridge, MA 2006-2007	Gilbert and 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.
Neighborhood Housing Services of Greater Nashua Nashua, New Hampshire 2007	Gilbert and Gould	Assistance with five-year strategic plan.
CATCH Neighborhood Housing Concord, New Hampshire 2007	Elving	Assistance with strategic planning.
Volunteers of America Washington, DC and National 2004-2007	Elving, Gilbert, Gould and Weber	Various projects, including development of national and local strategic and business plans for real estate development and property management; general business planning for affiliates.
SOME (So Others Might Eat) Washington, DC 2006-2007	Gould and Weber	Assessment and business planning of organizational capacity for real estate development, property management and asset management.
Mutual Housing of South Central Connecticut New Haven, CT 2006	Gilbert and Gould	Assessed the environment for potential expansion of affordable housing development program into an adjacent county.
Bay Area LISC San Francisco, CA 2006	Gould and Weber	Design and implementation of regional study of property management best practices, challenges, and policy recommendations. Report published by LISC in 2006.
Enterprise Community Investment 2005-2006	Gilbert	Performed site assessments for projects in New York and Vermont for potential tax credit investments by Enterprise's funds.
HAP, Inc. Springfield, MA 2005-2006	Elving, Gilbert, Gould and Weber	Strategic planning process for real estate development and property management departments of regional housing organization; re-design of organizational development for entire agency.

North Shore Housing Trust Newburyport, MA 2005-2006	Gilbert and Gould	Evaluated feasibility of and demand for three potential business lines.
Valley Community Development Corporation Northampton, MA 2005-2006	Gilbert and Gould	Strategic plan development.
Laconia Area Community Land Trust Laconia, NH 2005	Gould and Weber	Developed and wrote Operational Plan, including financial model.
MHA of Greater Hartford Hartford, CT 2005	Gould and Weber	Hartford, CT 2005
Affordable Housing, Education and Development (AHEAD) Littleton, NH 2005	Gould and Weber	Developed and wrote Operational Plan, including financial model.
Neighborhood Housing Services of Greater Nashua Nashua, NH 2005	Gilbert and Gould	Developed and wrote Operational Plan, including financial model.
The Housing Partnership Network Boston, MA 2004 - 2005	Gould and Weber	Part of research team with the Urban Institute, Rachel Bratt and Bill Ryan investigating 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.
The Housing Partnership Portsmouth, NH 2004	Weber	Worked with Board of Directors to create position description in preparation for THP's recruiting new Executive Director.
Cambridge Housing Authority Cambridge, MA 2004-2005	Gould and Weber; Gilbert and 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.
Neighborhood Reinvestment Corp. Boston, MA 2003-2004	Gould and Weber	Conducted a survey of best practices in resident services and resident leadership, including eight community development non-profits across the country.

Preservation of Affordable Housing Boston, MA 2003 - 2004	Elving, Gould and 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.
Metropolitan Boston Housing Partnership Boston, MA 2003	Elving and 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.
Metropolitan Boston Housing Partnership 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.
Virginia Beach Community Development Corporation Virginia Beach, VA 2002	Gilbert and 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.
Mercy Housing, Inc. (MHI) Denver, CO 2001 - 2002	Gould and 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.
Pine Street Inn Boston, MA 2001-2002	Elving and 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.
Abt Associates, Inc. Boston, MA 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.
Abt Associates, Inc. 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.
JER Hudson Housing Capital 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.

Codman Square Community Development Corporation Boston, MA 2001; 2004 - 2005	Gould and Weber	Conducted organizational assessment, focusing on issues of organizational structure and design, communication, board/staff relations and board committee structure. Updated assessment. Developed and wrote Operational Plan with financial model.
Northern Community Management Corporation St Johnsbury, VT 2001	Gould and Weber	Created 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. Work supported in part by Neighborhood Reinvestment Corporation.
Neighborhood Reinvestment Corporation Boston, MA 2001	Gould and 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.
Asian American Civic Association Boston, MA 2001	Gould	Designed and analyzed bilingual client satisfaction survey (involving 200+ clients). Led strategic planning retreat for board and staff.
The Community Builders Boston, MA 2001	Gould	Developed and installed database tool (built in Access) for analyzing development project profitability and staff time allocations.
Metropolitan Development and Housing Agency 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.
House of Hope 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.
Asian Community Development Corporation 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.
New Economics for Women (NEW) Los Angeles, CA 2000, 2005	Gould and Weber	Conducted organizational assessment and 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
NeighborWorks® America, Local Initiatives Support Corp. and Enterprise Foundation Nationally Since 2003	Gould and Weber	Co-developed curriculum; teach five-day course on “Advanced Asset Management” as part of the Consortium for Housing and Asset Management (CHAM) program.
NeighborWorks® America and Institute of Real Estate Management (IREM) Nationally Since 2003	Gould	Developed curriculum; teach three-day course on “Financial Tools for Asset Managers”
NeighborWorks® America 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.
Various Locations 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.
Institute of Real Estate Management (IREM) 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 MNT201 course: “Managing Maintenance Operations” and ETH800 course: “Ethics for the Real Estate Manager.”
Local Initiatives Support Corporation 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.
University of Pennsylvania Philadelphia, PA Since 2004	Weber	Developed and teach “Marketing and Lease-Up” and “Property Management & Operations” to Center for Urban Redevelopment Excellence Fellows (Penn CUREX program).
NeighborWorks® America Multifamily Institute Boston, MA Annually since 2001	Weber	Lead instructor for 5-day Multifamily Institute Asset Management Clinic. Revised curriculum for 2003 clinic.

U. S. Department of Housing & Urban Development 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.
Lynn Housing Authority Lynn, MA 2002	Elving	Taught one-day course, introduction to Low Income Housing Tax Credits.
The Community Builders 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.
Housing Authority of Baltimore City Baltimore, MD 2001	Gilbert	Organized and co-taught one day training to project management staff on fundamentals of development and HOPE VI.
Tufts University 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.

REPRESENTATIVE EXPERIENCE: RECRUITMENT

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