

**PROPERTY and ASSET MANAGEMENT ORGANIZATIONAL ASSESSMENTS,
BUSINESS & OPERATIONS PLANS AND CONSULTATION**

- A. PROPERTY MANAGEMENT ORGANIZATIONAL ASSESSMENTS
- B. PROPERTY MANAGEMENT BUSINESS/OPERATIONS PLANS
- C. PROPERTY AND ASSET MANAGEMENT CONSULTATION

A. PROPERTY MANAGEMENT ORGANIZATIONAL ASSESSMENTS SINCE 2006

Description: Review of key portfolio characteristics, financial analysis of property management company/division, evaluation of staffing and operational practices. Includes identification of challenges to success and specific recommendations. May include stakeholder interviews or an assessment of whether or not to outsource property management.

Client Name	Location	Year	No. of Units	No. of Properties	VIVA Principal(s)
New Neighborhoods, Inc.	Stamford, CT	2012	317	7	Weber
Asociación Puertorriqueños en Marcha	Philadelphia, PA	2011	212	7	Weber
Regional Affordable Housing Corporation	Bennington, VT	2011	219	19	Weber
Central Vermont Community Land Trust	Barre, VT	2011	368	17	Weber
Common Ground – asset management	New York, NY	2011	2,572	11	Weber
Chinatown Community Development Center	San Francisco, CA	2005 & 2011	1,370	18	Weber
The Caleb Foundation	Gloucester, MA	2011	827	14	Weber
Watertown Community Housing	Watertown, MA	2011	18	1	Weber

Ability Housing	Jacksonville, FL	2010	224	4	Weber
East Bay Asian Local Development Corp.	Oakland, CA	2010	905	15	Weber
Windham Housing Trust	Brattleboro, VT	2009	242	12	Weber
Little Tokyo Service Center	Los Angeles, CA	2009	641	15	Weber
Jubilee Housing	Washington, DC	2009	215	3	Weber
Community Connections – Business Plan Status Report	Washington, DC	2009	417	80	Weber
South Shore Housing Corporation	Kingston, MA	2009	408	17	Weber
Community Concepts	South Paris, ME	2009	149	8	Weber
Community Teamwork, Inc.	Lawrence, MA	2008	104	4	Weber
Elderly Housing Management	Hamden, CT	2008	2,220	49	Weber
HAP Housing - Business Plan Status Report	Springfield, MA	2008	409	18	Weber
CHC Property Management	San Francisco, CA	2007	991	10	Weber
Cleveland Housing Network	Cleveland, OH	2007	2,700	2,500	Weber
Common Ground	New York, NY	2007	1,514	5	Weber

Eden Housing	Cleveland, OH	2007	354	105	Weber
Hispanic Housing	Chicago, IL	2007	4,325	26	Weber
Volunteers of America Southeast	Mobile, AL	2007	707	37	Weber
Housing and Community Services/ Wedge Management	San Antonio, TX	2007	2,760	34	Weber
Realty Resources	Rockport, ME	2006	1,498	52	Weber
Preservation Housing Management	Kansas City, MO	2006	3,551	33	Weber
South County Property Management	Gilroy, CA	2006	1,223	33	Weber
MHA of South West Connecticut	Stamford, CT	2006	386	9	Weber
Broad-Park Development Corp.	Hartford, CT	2006	494	24	Weber
Morgan Kaylee	Springfield, MA	2006	199	5	Gilbert & Weber
Domus, Inc.	Westfield, MA	2006	81	5	Weber
Community Connections	Washington, DC	2006	417	80	Weber
Avesta Housing	Portland, ME	2006	1,068	42	Weber

B. PROPERTY MANAGEMENT BUSINESS/OPERATIONS PLANS SINCE 2005

Description: Detailed 3 or 5-year property management operations or business plans including goals, objectives, clients, programming initiatives, staffing, multi-year financial plan, time line, risks and evaluation strategy. May include interactive financial model.

Client Name	Location	Year	No. of Units	No. of Properties	VIVA Principal(s)
Sacramento/Yolo Mutual Housing Association	Sacramento, CA	2012	900	14	Weber
Common Ground – asset management	New York, NY	2011	2,700	13	Gould & Weber
Common Ground – property management	New York, NY	2008	1,514	5	Gould & Weber
CHC Property Management	San Francisco, CA	2007	991	10	Weber
Eden Housing	Cleveland, OH	2007	354	105	Weber
Community Connections	Washington, DC	2007	417	80	Weber
A Community of Friends	Los Angeles, CA	2006	1,779	43	Weber
Preservation Housing Management	Kansas City, MO	2006	3,551	39	Gould & Weber
Chinatown Community Development Center	San Francisco, CA	2006	1,143	18	Weber
HAP Housing	Springfield, MA	2005	349	22	Weber
Sacramento MHA & Sterling Asset Mgmt. Co.	Sacramento & Davis, CA	2005	1,733	30	Weber

C. PROPERTY AND ASSET MANAGEMENT CONSULTATION

Client Name Location Dates	Viva Principal(s)	Description
Pelham Corporation Framingham, MA Ongoing since 2004	Gould & Weber	Provide asset management services to the Board of Directors of this 540-unit mixed-income housing community.
Cambridge Housing Authority Cambridge, MA Ongoing since 2005	Weber	Provide ongoing consulting in organizational design and budgeting as this Moving-To-Work public housing authority continuously evaluates and strengthens its property and asset management operations.
Castle Square Tenants Organization Boston, MA Ongoing since 2005	Weber & Gould	Provide periodic property and asset management services to the resident owners of this 550-unit affordable housing property in Boston's South End.
Hudson Housing Capital New York, NY Ongoing since 2007	Weber	Provide periodic property operations evaluations of potential investment projects, including supportive housing developments.
Twin Cities CDC Fitchburg, MA Ongoing since 2011	Weber	Provide ongoing property and asset management consulting services as this CDC grows and strengthens its asset management capacity.
HomeWORD Billings, MT 2012	Weber	Provide property management consulting to this nonprofit evaluating whether or not to pursue self-management of some of its portfolio.
Nan McKay & Associates El Cajon, CA 2007 – 2011	Weber	Part of team evaluating for HUD those public housing authorities who have applied for "Stop Loss" in conjunction with their transition to asset-based management and budgeting. Also part of team that conducted ten asset management training conferences to housing authorities across the country in 2009. Provided tailored training to the Hawaii Housing Authority in 2010.
Asociación Puertorriqueños en Marcha Philadelphia, PA 2011	Weber	Created an asset management strategy for this neighborhood based nonprofit that contained two options depending on whether or not it outsourced its property management to a third party.

Mutual Housing Association of Southwest Connecticut Stamford, CT 2011	Weber	Provided LISC-sponsored consulting services in conjunction with this affordable housing nonprofit's need to restructure its property management operations or outsource some or all of them to a third party. Included consulting with the Board.
Center City Housing Duluth, MN 2010	Weber	Provided asset management and organizational development consulting for this regional nonprofit through a LISC technical assistance contract.
Econometrica Bethesda, MD Since 2010	Weber	Part of team providing technical assistance to public housing authorities as they transition to asset-based management. – including Detroit Housing Commission, Housing Authority of Cook County
Avesta Housing Portland, MA 2009	Weber	Provided assessment of and recommendations for enhancing property management accounting for portfolio of 51 properties with 1,341 units.
Volunteers of America Arlington, VA 2008	Weber	Facilitated planning session on asset management staffing and roles.
The Nelrod Company Silver Spring, MD 2008	Weber	Facilitated planning session with senior HUD public housing staff on principals of asset-based management.
G.L. French & Associates Raleigh, NC 2008	Weber	Edited public housing asset-based property management curriculum prepared for HUD.
Needham Housing Authority Needham, MA 2008	Weber	Created organizational staffing models based on whether the Needham Housing Authority continued to manage its and the neighboring Wellesley Housing Authority portfolios together or the two agencies would manage their portfolios separately.

The following is a sample of VIVA's property management consultation work prior to 2008

<p>Econometrica Bethesda, MD 2007 - 2008</p>	Weber	<p>Part of team that prepared for HUD an organizational implementation plan and conducted training for the Housing Authority of New Orleans (HANO) to comply with HUD's transition to asset-based management and budgeting in public housing.</p>
<p>Econometrica Bethesda, MD 2006</p>	Weber	<p>Part of team that created the Stop-Loss Submission Kit for public housing authorities moving to asset-based management and budgeting.</p>
<p>NeighborWorks® America Multifamily Initiative Washington, DC 2005 – 2006</p>	Weber	<p>In partnership with Abt Associates, conducted study entitled "Seven Strategies for Successfully Marketing and Stabilizing the Occupancy of Mixed-Income/Mixed-Race Properties" based on eight in-depth case studies in different communities around the country.</p>
<p>Graduate School of Design Harvard University Cambridge, MA 2000 - 2003</p>	Weber	<p>Conducted research and direct field testing activities related to the \$3,000,000 congressionally funded Public Housing Operating Cost Study created to determine what it should cost to operate good public housing.</p>
<p>Abt Associates Bethesda, MD 2001 - 2002</p>	Weber	<p>Provided asset management capacity-building training to asset management staff of the Chicago Housing Authority. Created asset management tools to review performance of third-party managers.</p>
<p>Mercy Housing, Inc. Mercy Services Corporation Denver, CO 2001 - 2004</p>	Weber	<p>Facilitated and coordinated several organizational and process redesign initiatives in various departments including property management, community and resident initiatives, investment and underwriting procedures, business model redesign, regional planning and indirect cost allocations. Also worked with consulting division on evaluating outside property management organizations. Mercy is a large national non-profit developer (11,000 units) and manager (nearly 8,000 units) of affordable housing.</p>