

A photograph of the Hidalgo County Court House, a large, modern building with a light-colored stone or concrete facade. The building is set against a blue sky with scattered white clouds. In the foreground, there are green trees and a person walking on a path. The text "HIDALGO COUNTY COURT HOUSE" is visible on the building's facade.

PROPOSED FOR

The County of Hidalgo - Urban County Program

REQUEST FOR PROPOSALS

Consultant Services for the Preparation of a Five-Year Consolidated Plan, FY23 Annual Action Plan and Analysis of Impediments for the County of Hidalgo, City of Edinburg, City of McAllen and the City of Mission

RFP No. 5022-98-2101-0000-5CON-SDLG

PROPOSED BY

National Development Council

Headquarters

1111 Superior Ave East,
Suite 1114
Cleveland, OH 44114
www.ndconline.org
1-800-501-7489

Proposal Contact

Laura Salinas-Martinez,
Operations Support Director,
Technical Advisory Services
(210) 314-9860
lsalinas@ndconline.org



November 16, 2022

SECTION C

Price Proposal

Section C. Detailed Description of Services and Cost Breakdown

FEE SCHEDULE	
Task/Deliverable	Cost
PHASE I – December 2022 thru February 2023	
<u>Consolidated Plan</u>	
<ol style="list-style-type: none"> 1. Conduct project kick off meeting. 2. Review, analyze and prepare necessary data for Consolidated Plan. 3. Develop a strategy for citizen participation process. 4. Develop marketing materials for public engagement. 5. Begin conducting consultations with private agencies, public agencies, and community groups. 6. Develop Survey. 	\$75,000.00
<u>Analysis of Impediments/ Assessment of Fair Housing</u>	
<ol style="list-style-type: none"> 1. Review existing plan; and 2. Complete an examination of pertinent data including demographic, income, employment, and housing data as well as studies that have been completed that relate to fair housing. 	\$15,000.00
PHASE II – February 2023 thru June 2023	
<u>Consolidated Plan</u>	
<ol style="list-style-type: none"> 1. Complete consultations with private agencies, public agencies, and community groups, including town hall meetings and focus groups. 2. Submit draft Consolidated Plan and Annual Action Plan to the County & Cities for review. 3. Complete summary information necessary for committee and council briefings. 4. Submit four copies (including one original bound and one master unbound) of the Con Plan and Annual Action Plan to the County & Cities as well as a digital version of the same. 5. Enter Consolidated Plan and Annual Action Plan to IDIS. 6. HUD Response and Acceptance. 	\$34,000.00
<u>Analysis of Impediments</u>	
<ol style="list-style-type: none"> 1. Complete consultations with private agencies, public agencies, and community groups, including town hall meetings and focus groups. 2. Submit draft Analysis of Impediments to the County & Cities for review. 3. Complete summary information necessary for committee and council briefings. 4. Submit four copies (including one original bound and one master unbound) of the Analysis of Impediments to the County & Cities as well as a digital version of the same. 	\$10,000.00
TOTAL FOR PHASE I & II	
	\$134,000.00*

** Pricing includes travel and accommodations for the Project Team Lead and one Project Team Member for up to three client visits that can be utilized at project initiation, public meetings, committee meetings, and council meetings.*

OPENED

11/16/22
2:06pm

Witnessed

KiE

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The County of
Hidalgo - Urban
County Program

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McAllen and the City of
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November 16, 2022

MISSION SINCE 1969

NDC directs capital to support the development and preservation of affordable housing, creates jobs through small business lending, advances livable communities with social infrastructure investment, and builds capacity with hands-on technical assistance to local governments.

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Section C. Price Proposal (Separate Cover)

Detailed Description of Costs & Cost Breakdown

SECTION A
Non-Price Proposal



National Development Council
1111 Superior Avenue East, Ste 1114
Cleveland, OH 44114
(800) 501-7489
www.ndconline.org

November 16, 2022

Eduardo Belmarez, Purchasing Director
Hidalgo County Purchasing Department
2812 S. Business Hwy. 281
Hidalgo County Administration Building
Edinburg, Texas 78539

RE: 5 Year Consolidated Plan RFP No. 5022-98-2101-0000-5CON-SDLG

Dear Mr. Belmarez:

On behalf of the National Council for Community Development, Inc. dba the National Development Council (NDC), I am pleased to submit for your consideration the enclosed response to the County of Hidalgo, City of Edinburg, City of McAllen and the City of Mission for preparation of their Five-Year Consolidated Plan, FY23 Annual Action Plan and Analysis of Impediments. NDC understands all aspects of the solicitation; and as such, is committed to performing these services.

NDC professionals have delivered a unique combination of community development, economic development and housing development services – including planning and policy solutions, technical assistance, training, and financing. In addition, throughout the pandemic, NDC has served as third party administrator of emergency housing and business assistance programs resulting in deployment of over \$644 million in disaster recovery funding throughout the U.S. NDC gained tremendous insight and experience in developing plans, policies and procedures for disaster recovery programs and their implementation.

NDC is uniquely qualified to deliver the requested services as it has been an innovator in helping clients develop, implement and refine affordable housing, community development and economic development plans, policies and programs. NDC advises on the Community Development Block Grant (CDBG), HOME Investment Partnerships Program, CARES Act and ARP Act funding. NDC's most recent and relevant experience includes successful development and acceptance of a HUD Consolidated Plan/Action Plans in San Antonio, TX and Lewisville, TX.

Our project team brings the in-depth knowledge and unparalleled technical expertise necessary to successfully complete this project. NDC appreciates the opportunity to submit this proposal. Please contact Laura Salinas-Martinez, Operations Support Director, at (210) 314-9860 or lsalinas@ndconline.org if you have any questions or need additional information. Thank you.

Sincerely,

Daniel Marsh III

Daniel Marsh III
President & CEO

Section A-2. Qualifications and Experience

Firm Information & Experience

Established in 1969 at the beginning of the community development movement, the National Development Council (NDC) has played an integral role in shaping the strategies and methodologies that have set the standards of excellence in the practice of local economic development, affordable housing, and community development. NDC's staff has worked with nonprofit and public sector practitioners in every one of the 50 states, more than 100 entitlement cities and counties, and hundreds of small cities to help leverage public funds in exchange for community development projects that generate long-term and sustainable community wealth.

NDC is a nonprofit organization that has 10-member Board of Directors. NDC employs 80 people and is led by Daniel Marsh III, President & CEO and the following leadership team members:

- Raquel Favela, Sr. Executive Vice President, Training & Technical Advisory Services
- David Trevisani, Sr. Executive Vice President, Economic Development
- Michael Griffin, Sr. Executive Vice President, Affordable Housing
- Adam Ennis, Chief Financial Officer, Finance
- Gertrude Scriven, Human Resources Director, Human Resources & Administration

NDC is headquartered in New York City and has the following office locations:

1. 633 3rd Avenue, 19th Floor, New York, NY 10017
2. 1111 Superior Ave East, Suite 1114, Cleveland, OH 44114
3. 4101 Spring Grove Ave, Suite A, Cincinnati, OH 45223
4. 1808 S. Good Latimer Expressway, Dallas, TX 75226
5. 1037 NE 65th Street, Suite 368, Seattle, WA 98115

NDC's mission focuses on increasing the flow of capital for homes, jobs, and community as described below.



HOMES

We assist in the development of housing by leveraging scarce public resources to ensure that access to housing will also mean access to transportation, jobs, and amenities.



JOBS

We use our knowledge of the private sector's strengths and limitations to structure and employ programs that provide capital to small businesses.



COMMUNITY

We provide access to tools for the financing and development of infrastructure that can facilitate economic development and improve quality of life.

NDC acts as a teacher, advisor, investor, developer, and lender all in one, working tirelessly to increase the flow of investment capital, spur job creation and bring community development to America's economically challenged areas. NDC's core expertise is in assisting its client communities in strategic uses of public resources and incentives to leverage private investment in economic and community development efforts. NDC has excelled at delivering effective public-private partnerships that demonstrate these principles by providing direct technical assistance, building the capacity of our client staff, applying extensive knowledge of public sector financing with direct development experience, and helping our clients negotiate the best possible development outcomes. NDC's technical assistance is deeper and broader than consulting. We design and structure economic development and public facility finance programs, identify sources for funding, secure the capitalization, and train and work alongside our clients' staff in program operations. NDC's mission is skills-transfer to build local capacity.

NDC undertakes its work through two areas of activity focus: capacity building and financing & development, as shown below.

CAPACITY BUILDING

Technical Assistance



NDC Field Directors help define, design, and execute development and business finance initiatives.

Training & Certification



NDC instructors teach the skills and knowledge needed to successfully facilitate housing and economic development projects.

FINANCING & DEVELOPMENT

Corporate Equity Fund



NDC serves as a development partner as well as provides syndicated investments in low income and historic tax credits.

Small Business Lending



NDC creates jobs through its Small Business Lending programs; the Grow America Fund and Community Impact Loan Fund target its flexible lending to MWBE small business and LMI communities.

Housing & Econ Development Corp



HEDC is a 501(c)(3) nonprofit affiliate of NDC that finances and builds community and public facilities on behalf of our communities through public-private partnerships and new markets tax credits.

NDC's founding and continuing mission is to direct capital to support the development and preservation of affordable housing, create jobs through small business lending, advance livable communities with social infrastructure investment, and build capacity with hands-on technical assistance to local governments and community development organizations. For more than five decades, this has been the foundation of the NDC services listed below:

Training: Recognizing that local capacity means local empowerment, over 40 years ago NDC created the first professional education and certification program for community-based economic, housing and community development practitioners. Since then, NDC has trained more than 81,000 individuals from a range of communities - urban and rural, large, and small - in the art and science of community development and finance. This work continues in every course with up-to-date curricula that reflect the changing finance and policy landscapes, with innovations in

remote and in-person classroom technologies, and with practical, hands-on problem-solving experience in actual development projects.

Technical Assistance: NDC is one of the nation's leading not-for-profit providers of technical assistance in the areas of economic development and housing development finance and underwriting, including small business underwriting. For over 50 years, NDC's staff has worked with nonprofit and public practitioners in every one of the 50 states, in hundreds of large and small cities and rural areas, to help plan and execute development strategies, and to access, leverage, and deploy financing from public and private sources. We work side-by-side with our local partners, and with each project completed and program created, these local practitioners gain experience and knowledge for their continuing work in creating long-term and sustainable community wealth. Technical assistance is provided by field directors with a minimum of ten years progressively responsible experience in the field of housing and economic development. They are subject matter experts in federal programs and achieve required certifications to provide clients guidance on their most difficult community development projects, policies, and strategies.

Affordable Housing: Affordable housing, a critical element in creating equitable communities, has been an NDC focus from the beginning. Our technical assistance has helped the hundreds of communities we serve plan and finance housing throughout the 50 years of changing federal and state policies. When the Low-Income Housing Tax Credit became the primary source of financing, we created NDC's Housing & Economic Development Corporation (HEDC) Corporate Equity Fund (CEF). CEF's syndicated multi-investor funds provide equity capital for the construction and rehabilitation of affordable housing using Low Income Housing, Historic Preservation and Renewable Energy Tax Credits. NDC'S CEF works with local housing sponsors and developers from project inception, guiding the financial structuring and, again, building local technical capacity. CEF has financed nearly 13,000 housing units.

Small Business Lending: Access to capital for small businesses is another cornerstone of equitable community development. NDC first entered this field of work with a service that helped minority business owners access credit from conventional banks through SBA and other loan programs.

Grow America Fund: Over 30 years ago, we began our own small business lending activities with NDC's Grow America Fund (GAF), the nation's first and only U.S. SBA-licensed Small Business Lending Company (SBLC) owned and operated by a nonprofit organization. GAF, which became certified as a Community Development Financial Institution (CDFI) in 1997, is a small business loan fund whose mission is to create jobs, stimulate investment, and build the strength of the entrepreneurial and small business sector in low-income communities. GAF's loans range from \$150,000 to \$2,000,000, with over 60% or more of its loans made to businesses in CDFI eligible areas. GAF has loaned almost one half billion dollars to more than 3,200 small businesses, creating and retaining over 50,000 jobs, including thousands of construction jobs. Additionally, NDC has considerable experience operating non-SBA loan funds capitalized with both public and private funds that offer a range of loan sizes, including loans under \$50,000.

Community Impact Loan Fund: Recognizing another unmet need in equitable community development – better access to credit for smaller, younger, minority-owned businesses,

NDC created its Community Impact Loan Fund (CILF) in 2014. A CDFI since 2016, CILF works through community networks and engages with local partners to conduct outreach, connect businesses to networks of support, and build local capacity, similar to the vision and purpose of the SBA Community Navigator Pilot Program. CILF provides guidance to businesses before the loan application is even formally initiated and continues working with the businesses to loan closing and throughout the period of the loan. During this relationship, we help businesses anticipate problems, help solve them when they arise, and, at the end of the loan period, position businesses to emerge with greater equity and greater wealth. Close to 95% of CILF's lending activities have assisted low-income and minority/woman-owned entrepreneurs or non-profits that serve low-income communities or communities of color. In 2020, CILF made 131 loans totaling more than \$20 million and in the first half of 2021, CILF has loaned more than \$12 million to 201 businesses.

Multicultural Community Investment (MCI) Initiative: In 2019, NDC created its Multicultural Community Investment (MCI) Initiative to engage with local community development ecosystems more deeply in delivering capital and technical assistance to BIPOC businesses and their communities. MCI debuted in Broward County, FL; Cleveland and Cuyahoga County, OH; and the Greater St. Louis Region, MO. MCI collaborates and creates partnerships with members of those ecosystems to engage in outreach and to identify businesses that need capital or technical assistance. These outreach partners include business support organizations; neighborhood, social, civic, and religious organizations; local outposts of public agencies; and other community stakeholders. These partners are not only culturally integrated into their neighborhoods and social infrastructure, but they are also skilled in providing technical assistance, business counseling, capacity building, and training in various aspects of small business operations. MCI connects businesses with GAF, CILF, and other NDC affordable housing and community development resources.

Pandemic-Related Small Business Assistance and Housing Assistance: Shortly after the COVID-19 pandemic began its march across the nation, NDC's existing client communities called upon NDC to aid them in redesigning and redeploying their existing programs to respond to the crisis faced by local small businesses and low-income households. Additionally, NDC began serving as a third-party administrator and/or lender for many statewide entities, counties, and cities across the nation and helped to deploy over \$644 million in COVID-19 financial assistance to 32,229 businesses and 2,541 low-income households. As a result of our participation in these initiatives, we collected both quantitative and qualitative data on the current (and evolving) state of small businesses and community needs.

Staff Expertise

NDC's staff is a talented group of former bankers, government employees, developers, entrepreneurs, economic development leaders and affordable housing and community development professionals. This diverse mix of backgrounds gives NDC a special understanding of both private and public sector financing/funding sources and their respective community planning and compliance requirements. Laura Salinas-Martinez, Operations Support Director with the Training & Technical Advisory Services Group, will serve as the Project Lead and the primary point of contact.

PROJECT TEAM



**LAURA SALINAS-
MARTINEZ**
Project Team
Lead



**PATRICIA
SANTA CRUZ**
Project Team
Member



**MAUREEN
MILLIGAN**
Project Team
Member



**MONIFA
WATSON**
Project Team
Member



**RAQUEL F.
FAVELA**
Project Advisor



**NDC FELLOWSHIP
PROGRAM**
Project Team
Support

Laura Salinas-Martinez is the Operations Support Director at NDC and an experienced affordable housing and community development professional with vast working knowledge of operations, federal grants administration, the Community Development Block Grant (24 CFR Part 570), the HOME Investment Partnerships Program (24 CFR Part 92), the Neighborhood Stabilization Program, Consolidated Plan Revisions and Updates Final Rule (24 CFR Part 91), the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR 200), Environmental Review Requirements (24 CFR Part 58), planning and policy development, programmatic implementation, contract negotiations, and organizational leadership. Before joining NDC, Ms. Salinas-Martinez served as the Grants Administrator (and in several other management roles) for the City of San Antonio where she had full management responsibility of annual HUD entitlement funding of over \$20 million to include ensuring timely draws and commitment deadlines, compliance and performance reporting, action plan development, grant reconciliations, IDIS activity set up and reporting, consolidated annual performance and evaluation reporting and serving as the primary point of contact with HUD. In addition, during the pandemic, she developed policies/procedures and led the processing teams for the City's COVID-19 Emergency Housing Assistance Program that subsequently deployed hundreds of millions of dollars. Since 2000, Ms. Salinas-Martinez has worked in several key roles organizations to include the City of Yakima's Office of Neighborhood Development Services (Washington), San Antonio Housing Authority, Neighborhood Housing Services of San Antonio and the Brooks Development Authority. Ms. Salinas-Martinez was born and raised in Edinburg, Texas and visits the Rio Grande Valley frequently. She attended the University of Texas-Pan American (now UT-RGV); she holds a Bachelor's Degree in Business Administration from Heritage University (Toppenish, WA) and a Master's degree in Business Administration from St. Mary's University (San Antonio, TX). Ms. Salinas-Martinez has resided in San Antonio since 2003 and is fluent in English and Spanish.

To ensure that we meet the needs of this project, NDC will draw upon its vast resources of staff expertise with the following Project Team Members whose complete resumes are provided in Section B-6:

Patricia Santa Cruz joined NDC in November 2021 as a Field Director in the Technical Advisory Services Division (Central Team). In this role, Ms. Santa Cruz assists local organizations in achieving a wide variety of community development goals. Patricia has 20 years of federal grant experience in management, administration, and implementation of federal programs. She has more than 12 years of experience in management and administration of HUD CDBG and HOME Program funds with various types of community development and housing projects. Her recent experience at the City of San Antonio includes

overseeing \$21 million in CDBG and HOME budgets and activities and \$17 million in CDBG Coronavirus Aid, Relief, and Economic Security (CARES) Act funds, ensuring the City met applicable funding commitment and expenditure deadlines, completing the Five-Year Consolidated Plan, as well as Annual Action Plans, Substantial Amendments, and Consolidated Annual Performance Evaluation Reports. She has extensive experience in other operational aspects of CDBG and HOME programs including IDIS, environmental reviews, Section 3, program compliance, eligibility determination, and contract administration. She also assisted with the implementation, policy development and monitoring of the City's \$140 million COVID-19 Emergency Housing Assistance Program funded with CARES Act and other federal and local funds and led the development of the department's Equity Action Plan, which outlines two-year goals and strategies for advancing racial and economic equity in their programs and policies. Ms. Santa Cruz is fluent in English and Spanish and resides in San Antonio, Texas.

Maureen Milligan is a Field Director in the Technical Advisory Services Division (Central Team). Ms. Milligan has been a licensed attorney for nearly 17 years and has drafted state legislation, local ordinances, municipal court manuals, multi-departmental standard operating procedures, HUD Consolidated Plans, and local housing strategies. Immediately prior to joining NDC, she served as an Assistant Director in the Dallas Department of Housing and Neighborhood Revitalization where she managed a team of community development professionals who facilitated home repair, mortgage assistance, housing development and land bank programs that used funding sources including CDBG and HOME grants, general obligation bonds, and municipal general funds. During her tenure as an Assistant Director, Ms. Milligan led the implementation of the City of Dallas's first comprehensive housing policy, including drafting ordinances, program statements, and procedures related to incentive zoning, housing tax credits, community land trusts, tangled titles, neighborhood empowerment zones and strategic land acquisition/disposition. She established and managed the Housing Policy Taskforce where she engaged industry professionals, neighborhood leaders, and city staff in policy development at both the local and state level. Ms. Milligan prepared and presented City Council committee briefings and agenda items and worked closely with elected officials and city staff. Ms. Milligan has a Bachelor's Degree in English from Duke University, Master's Degree in Education from the University of Virginia, and a Juris Doctor from American University. She is a Certified Economic Development Professional and licensed attorney who joins practical experience with problem solving for communities. Ms. Milligan resides in Dallas, Texas.

Monifa Watson is a Field Director in the Technical Advisory Services Division (Central Team). Ms. Watson assists with the servicing of contracts to local municipalities and client organizations with a concentration on community engagement efforts. She also lends support to other community development planning and implementation processes and strategies. Ms. Watson previously worked in Small Business Lending, marketing NDC's loan products and servicing closed loans. Ms. Watson managed a portfolio of over 100 loans, developing professional relationships with borrowers and assisting them with post-closing compliance and capital needs. With over 20 years of non-profit management experience, Ms. Watson has managed a transitional housing facility, served as the Program Director for a national housing organization and conducted financial literacy and first-time homebuyer seminars. Ms. Watson resides in Tulsa, Oklahoma.

Raquel Favela is a recognized expert in economic development and housing with 25 years of experience. Ms. Favela joined NDC in 2007 and has been instrumental in the design, scaling and implementation of the flex-staff system which has allowed NDC to scale efficiently and deploy more than \$900 million in

Covid-response resources in NDC client communities around the country. As Senior Executive Vice President, she leads the Training and Technical Advisory Services Group in helping public sector clients understand their markets and develop customized strategic plans and policy solutions that build ecosystems critical to equitable job creation and diverse housing options. Ms. Favela's unique brand combines practical experience with her long-range planning and policy acumen to bring balanced problem solving to communities. A thought leader and authority, she has walked in the shoes of most of the major participants in real estate development: owner, investor, developer, consultant, governmental entity, lender, and landlord. Known for delivering results, while at the City of San Antonio, Ms. Favela is credited with producing San Antonio's first Strategic Community Development Plan in 2007. Ten years later while serving as the City of Dallas' Chief of Economic Development and Neighborhood Services, Ms. Favela was lauded for delivering the city's first Comprehensive Housing Policy that addressed longstanding fair housing issues and disparate impact. In her role with NDC, Ms. Favela has been the trusted advisor to clients across the country to include East Chicago, Indiana, Rockford, Illinois, Memphis, Tennessee, Los Angeles County, Commonwealth of Puerto Rico, the State of Illinois and in Texas, San Antonio, Irving, and Temple. Ms. Favela has guided clients on financing structures for challenging redevelopment projects, a role that garnered her extensive transactional experience with federal, state, and local tools available to maximize public benefits. Ms. Favela resides in San Antonio, Texas and is fluent in English and Spanish.

NDC's Fellowship Program gives graduate students an opportunity to gain valuable applied experience in the fields of affordable housing, community development and economic development. NDC recruits graduate students from the University of Texas' (at Austin) LBJ School of Public Affairs, University of California-Los Angeles' Luskin School of Public Affairs and the University of Washington's Evans School of Public Policy and Governance. Graduate Fellows provide a wide range of support to include research, data analytics, stakeholder outreach and community engagement.

Relevant Experience & References

Project/Reference No. 1

Client Name:	City of San Antonio, Neighborhood and Housing Services Department
Contact Name:	Edward Gonzales, Assistant Director (Retired)
Phone No.:	(210) 862-6897
E-mail:	edward.gonzales@hfcommunitas.org
Project Type:	2022-2026 HUD Consolidated Plan and Annual Action Plan
Project Description & Scope of Work:	NDC provided technical assistance, facilitated stakeholder meetings, developed resident needs surveys, and provided necessary data and analysis for the development of the City of San Antonio's Consolidated Plan and Annual Action Plan.

Project/Reference No. 2

Client Name:	City of Lewisville (TX)
Contact Name:	Ashleigh Feryan, Neighborhood Services Manager
Phone No.:	(972) 219-3736
E-mail:	aferyan@cityoflewisville.com
Project Type:	2022-2026 Consolidated Plan, Annual Action Plan, and Assessment of Fair Housing
Project Description & Scope of Work:	

NDC recently helped the City of Lewisville develop its 5-Year HUD Consolidated Plan, Annual Action Plan, and Assessment of Fair Housing. NDC met biweekly with City representatives as a means of maintaining open lines of communication and keeping the project on track. NDC facilitated four public town hall meetings, one public hearing, and completed consultations with numerous stakeholders representing social services providers, the school district, fair housing advocates, and appointed officials. NDC was responsible for entering the Consolidated Plan and Annual Action Plan into IDIS. Both the Consolidated Plan and the Assessment of Fair Housing received favorable feedback from the Lewisville City Council. *A copy of the Consolidated Plan and Assessment of Fair Housing is provided in Section B-7.*

Project/Reference No. 3

Client Name: Los Angeles County Development Authority
 Contact Name: Linda Jenkins, Community Development Director
 Phone No.: (626) 586-1765
 E-mail: Linda.Jenkins@lacda.org
 Project Type: 2023-2027 Consolidated Plan, Annual Action Plan, and Assessment of Fair Housing

Project Description & Scope of Work:
 NDC is in the process of assisting Los Angeles County develop its 5-Year HUD Consolidated Plan, Annual Action Plan, and Assessment of Fair Housing. Los Angeles is the largest urban county in the nation, with over ten million residents and 49 participating cities. NDC is currently implementing the stakeholder consultation and citizen participation phase, which includes working with the County to design a website that provides useful data for the 49 participating cities. NDC will be responsible for entering the Consolidated Plan and Annual Action Plan into IDIS.

Project/Reference No. 4

Client Name: City of Henderson, NV – Community Development and Services
 Contact Name: Hayley Jarolimek, Neighborhood Services Manager
 Phone No.: (702) 267-1541
 E-mail: hayley.jarolimek@cityofhenderson.com
 Project Type: HOME-ARP Allocation Plan

Project Description & Scope of Work:
 NDC is currently assisting the City of Henderson, NV with the development of their HOME-ARP Allocation Plan. NDC is: (1) developing marketing materials, surveys, public notices and presentations for public engagement and stakeholder consultation process; (2) identifying and gathering data, plans, and reports for the needs assessment and gap analysis; (3) conducting consultations with required stakeholders and conducting community input meetings; (4) managing the public comment process including initiating a public comment period of at least 15 days; (5) developing a draft HOME-ARP Plan in accordance with CPD Notice 21-10 for public review and holding one public hearing, and (6) will deliver a final draft of the HOME ARP Allocation Plan to the City.

Project/Reference No. 5

Client Name: City of Irving (TX)
 Contact Name: Steve Reed, Director
 Phone No.: (972) 721-3540

E-mail: sreed@cityofirving.org

Project Type: Housing Plan

Project Description & Scope of Work:

In 2021, NDC worked with the City of Irving to design a 20-year Housing Plan. The plan analyzes local housing conditions, including the age and diversity of the housing stock, and provides recommended strategies for producing and preserving housing along with helping families access suitable housing. The plan sets annual targets for new construction and preservation activity and analyzes the cost to achieve those goals. The plan was accepted by the City Council in July of 2021.

Actions Taken and Litigation

NDC has not had any actions take by any regulatory agencies or had any litigation involving NDC or its agents or employees with respect to work performed.

Section A-3. Approach to Scope of Work

In this section, NDC provides a summary of its work plan, which includes a description of the project along with details regarding the different phases of the project. This summary also includes NDC's suggested responsibility assignments.

NDC understands the project to include three (3) deliverables:

1. **Executive Summary** that is reader-friendly and that summarizes recommendations of the Consolidated Plan using graphs, tables, pictures and charts.
2. **5-Year Consolidated Plan** that identifies strategies and accompanying expenditures of funding that would guide the County & Cities in creating programs that provide decent housing, a suitable living environment, and expanded economic activities. The strategies will focus on expanding efforts to revitalize neighborhoods and provide housing opportunities through analysis of community housing market needs, housing stock, and socioeconomic trends while also identifying target housing and economic development areas.
3. **Analysis of Impediments to Fair Housing Choice** that identifies specific barriers that need to be addressed if future fair housing initiatives are to be successful.

Overview of Approach

NDC will follow HUD's recommended six phase process and focus on numbers 1, 2, 3 & 4 of the process: (1) determining needs, (2) setting priorities, (3) determining resources, (4) setting goals, (5) administering the programs, and (6) evaluating performance. NDC will work with staff to also address program monitoring.

Consolidated Plan/Analysis of Impediments – Stakeholder Consultation and Citizen Participation

Determining needs and setting priorities requires a robust citizen participation plan. NDC will ensure that the Consolidated Plan (ConPlan) and Analysis of Impediments (AI) is the result of an effective citizen participation process that follows the County & Cities' citizen participation plan. NDC encourages the use of online survey tools to help identify priorities for program areas and for fair housing choice. This proposed work plan includes development of an online, mobile-friendly survey to be distributed via email, social media platforms, community kiosks, libraries, and at other public venues. NDC also proposes to consult with members of housing and human services boards to assist with the development and deployment of the survey to maximize outreach to citizens, non-profit organizations, and other interested parties.

The Team's approach is to consolidate the citizen participation process required by the ConPlan with the consultation required for the Analysis of Impediment to Fair Housing Choice. Prior to engaging stakeholders, we will conduct a high-level analysis of local data and the existing regulatory environment. NDC has found that local stakeholders are more willing to support housing and other non-housing community development investments throughout a community when they understand how existing market forces, coupled with local regulations, impact the costs to develop housing and provide public services, the locations where such housing will be developed in the absence of public subsidies or intervention, the existing capacity of local non-profits to provide public services, and the current public investments in streets, parks, community facilities and other community assets.

The project team will pursue five approaches to engage key stakeholder groups and the broader community throughout the study.

1. NDC will design and deploy the citizen survey as described above.
2. NDC will facilitate Town Hall meetings as outlined in the County & Cities Citizen Participation Plans that cover topics designed to both educate and organize input from key stakeholder groups specifically involved in community development, public services, fair housing and neighborhood leadership.
3. NDC will conduct one-on-one consultations with local stakeholders.
4. After reviewing the survey results, conducting the town hall meetings and consulting with stakeholders, NDC will identify groups of residents who were underrepresented during the outreach – these groups may include persons with limited English proficiency. NDC will hold focus group meetings with such residents.
5. Following the community outreach, NDC will develop the Consolidated Plan and Analysis of Impediments and present it to the appropriate County & Cities staff, boards, and County Commissioners/City Councils for feedback.

Consolidated Plan - Housing and Homeless Needs Assessment

Housing Needs – NDC will provide an estimate of housing needs projected for the next five-year period. This includes: (1) an estimate of the number and type of families in need of housing assistance for extremely low-income, low-income, moderate-income, and middle-income families, for renters and owners, and (2) the specification of such needs for different categories of persons, including elderly persons; single persons; large families; public housing residents; families on the public housing and section 8 tenant-based waiting list; persons with HIV/AIDS and their families; victims of domestic violence, dating violence, sexual abuse and stalking; persons with disabilities; and formerly homeless families and individuals who are receiving rapid re-housing assistance and nearing the termination of that assistance. The description of housing needs will include a concise summary of specific housing problems, including cost-burden, severe cost-burden, substandard housing, and overcrowding (especially large families) experienced by extremely low-income, low-income, and moderate-income renters and owners compared to the jurisdiction as a whole. The terms “standard condition” and “substandard condition but suitable for rehabilitation” will be defined in the plan.

NDC will utilize the public datasets provided by HUD along with proprietary datasets, including Moody's Analytics, which provides current market rents, construction pipeline, vacancy rates and other data related to multifamily properties located in the County & Cities. NDC will also work with local Realtors to obtain local sales and rental data related to the single-family home market. NDC will also examine the extent to which any racial or ethnic group has a disproportionately greater housing need in any particular income category in comparison to the needs of that category as a whole.

NDC will complete all questions related to *Public Housing and Homeless Needs, Special Needs Populations and Non-Housing Community Development Needs*.

Consolidated Plan - Housing Market Analysis

General Characteristics (Number of Housing Units, Cost of Housing, Condition of Housing) – Based on information available to the County & Cities, NDC will describe the significant characteristics of the housing market in terms of supply, demand, condition, and the cost of housing; the housing stock available to serve persons with disabilities; and to serve persons with HIV/AIDS and their families. Data

on the housing market will include, to the extent information is available, an estimate of the number of vacant or abandoned buildings and whether units in these buildings are suitable for rehabilitation. The plan will identify and describe any area(s) where low-income families are concentrated and any area(s) of where racial or ethnic minority households are concentrated either in a narrative or one or more maps, stating how it defines the terms "area of low-income concentration" and "area of minority concentration." The plan will also provide an estimate of the number of housing units that contain lead-based paint hazards, as defined in section 1004 of the Residential Lead-Based Paint Hazard Reduction Act of 1992, and are occupied by extremely low-income, low-income, and moderate-income families.

NDC will also answer all questions related to *Public Housing, Assisted Housing, Homeless Facilities, Special Need Facilities and Services, Barriers to Affordable Housing, Non-Housing Community Development Assets, Needs and Market Analysis Discussion, Broadband Needs, and Hazard Mitigation.*

Strategic Plan

Priority Needs Analysis and Geographic Distribution – As required, the plan will include the priorities for allocating investment geographically and among different activities and needs in accordance with the tables prescribed by HUD.

Determining Resources & Setting Goals

The plan will set goals and allocate resources for those areas identified by the citizens participation that fall in the following categories: HOUSING (including Public Housing), HOMELESS, SPECIAL NEEDS POPULATIONS, COMMUNITY DEVELOPMENT.

As a result of the process, the County & Cities will be able to determine how the ConPlan strategies fit into its broader strategic plans and vision. It will also help identify barriers to affordable housing in the county.

Fair Housing -- As part of the certification to affirmatively further fair housing, the County & Cities assumes the responsibility of fair housing planning. An additional deliverable will be for NDC to update the existing analysis of impediments (AI) to fair housing choice so that the County & Cities can take appropriate actions to overcome the effects of any impediments identified through that analysis. Although AIs are not submitted or approved by HUD, the County & Cities may choose to provide the AI to HUD for review and comment. The beginning of a new Consolidated Plan five-year planning cycle is an appropriate time to update the AI to reflect the current fair housing situation in the community. NDC plans to use the Assessment of Fair Housing template and tools that are provided by HUD and will supplement HUD's data with data from the U.S. Census along with local data.

Annual Action Plan

The Annual Action Plan Section will include a concise summary of the actions, activities, and programs that will take place during the next year to address the priority needs and specific objectives identified by the strategic plan.

Summary of Work Plan

NDC will conduct all data analysis and planning necessary to engage in a meaningful community participation process that ultimately leads to the development of the 5-year Consolidated Plan and an updated to the Analysis of Impediments. As detailed in the timeline below, NDC's work will occur in 5

phases: (NDC will be responsible for all work items unless specifically noted as a "Responsibility of County & Cities.")

1. **Kickoff Meeting** – NDC will facilitate an in-person meeting that allows NDC team members to meet with County & Cities staff to discuss existing data/plans, review deliverables and timelines, and discuss IDIS access for NDC staff.

Responsibility of County & Cities: Identify a key staff member who will serve as the client contact for NDC. Obtain IDIS access for key NDC personnel. Provide copies (or weblinks) to all plans, data, and other documents that the County & Cities desires for NDC to review and incorporate into any of the deliverables. Identify key stakeholders who should or could be consulted during the development of the survey and town halls.

2. **Assessment of Current Conditions and Existing Plan Review** - This portion of the work plan includes a review and summary of the key data and recommendations included in existing County & Cities planning documents and a review of existing data related to economic conditions and the rental and homeownership housing market. NDC will also review the current regulatory and funding environment and the market forces that affect housing production and non-housing community development.

3. **Community Survey, Town Halls, Stakeholder Consultations, Focus Groups & Draft Deliverables** – NDC will design and deploy the SurveyMonkey-based survey, facilitate the community participation process, and facilitate required public hearings (for ConPlan/AI). During this time, NDC will submit draft versions of the Community Needs Assessment, Consolidated Plan, and Analysis of Impediments.

Responsibility of County & Cities: Review and approve the survey. Market the survey through County & Cities communication channels. Work with NDC to identify one in-person town hall meeting locations, dates for both the in-person and virtual town hall meetings, as well as dates for the public hearings. Provide projection and amplification equipment at selected locations. Ensure that notification for all meeting, public comment periods and public hearings comply with the Citizen Participation Plan. Review NDC draft(s) of deliverables and provide feedback.

4. **Final Deliverables** – NDC will review feedback received from staff and the public and will incorporate the feedback into final versions of the Consolidated Plan, Annual Action Plan, and Analysis of Impediments.

Responsibility of County & Cities: Confirm ConPlan budget amounts, priority needs, and projects. Provide information on any public comments received by the County & Cities.

5. **Submission of Consolidated Plan and Annual Action Plan to HUD via IDIS** – NDC will input all required data, maps and narrative information related to the ConPlan into IDIS and submit it to HUD.

Once the Consolidated Plan and Annual Action Plan are submitted to HUD via IDIS eCon Planning Suite, NDC will also be available to provide support in responding to HUD through the formal acceptance of these plans.

Section A-4. Plan of Services/Timeline

Below is an anticipated timeline based on the County & Cities submission deadline April 30, 2023. It should be noted that this is an accelerated timeline that may make meaningful engagement a bit challenging. NDC recommends submitting the Con Plan and Annual Action Plan 60 days after the date allocations are announced by HUD as outlined in CPD-22-05, "Guidance on Submitting Consolidated Plans and Annual Action Plans for Fiscal Year (FY) 2022" issued on March 25, 2022. This year, allocations were announced on May 13, 2022 and grantees with July 1 and August 1 program year start dates were able to postpone submission of their Consolidated Plan/Action Plan until July 11, 2022.

Task	Dec. '22	Jan. '23	Feb. '23	Mar. '23	Apr. '23	May. '23	Jun. '23
Kick Off Meeting							
Assessment of Current Conditions and Existing Plan Review							
Community Survey, Town Halls, Stakeholder Consultations, and Focus Groups							
Draft Deliverables							
Final Deliverables							
Submission of Consolidated Plan to HUD via IDIS and Respond to any HUD Inquiries							
HUD Response & Acceptance							

Section A-5. County/City Resources

NDC has outlined additional items that the County & Cities will be responsible for by Task Deliverable in Section A-3, under "Summary of Work Plan". These *sections are italicized* and restated below:

1. *Identify a key staff member who will serve as the client contact for NDC.*
2. *Obtain IDIS access for key NDC personnel.*
3. *Provide copies (or weblinks) to all plans, data, and other documents that the County & Cities desires for NDC to review and incorporate into any of the deliverables.*
4. *Identify key stakeholders who should or could be consulted during the development of the survey and town halls.*
5. *Review and approve the survey.*
6. *Market the survey through County & Cities communication channels.*
7. *Work with NDC to identify town hall meeting locations, dates for both the in-person and virtual town hall meetings, as well as public hearing dates.*
8. *Provide projection and amplification equipment at selected locations.*
9. *Ensure that notification for all meeting, public comment periods and public hearings comply with the Citizen Participation Plan.*
10. *Review NDC draft(s) of deliverables and provide feedback.*
11. *Confirm ConPlan budget amounts, priority needs, and projects.*
12. *Provide information on any public comments received by the County & Cities.*

SECTION B
Attachments

APPENDIX A
Certification
Regarding Debarment, Suspension and Ineligibility

As is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 76, Government-wide Debarment and Suspension, the applicant certifies, to the best of his or her knowledge and belief, that both it and its principals:

- a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
- b. Have not within a three-year period preceding this bid proposal and/or application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- c. Are not presently indicted for or otherwise criminally or civilly charged by a government entity with commission of any of the offenses enumerated herein; and
- d. Have not within a three-year period preceding this bid proposal and/or application had one or more public transactions terminated for cause or default.

Signature: DocuSigned by: Daniel Marsh III
ES07FFDC-0F164EA
 Print Name: Daniel Marsh III
 Title: President & CEO
 Telephone Number: (800) 501-7489
 Date: 11/15/2022

If the bidder is unable to certify to all of the statements in this Certification, such bidder should attach an explanation to this proposal.

APPENDIX B

PROPOSER'S AFFIDAVIT

PROPOSER'S AFFIDAVIT OF NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING

STATE OF TEXAS COUNTY OF HIDALGO

Affiant, Daniel Marsh III, being first duly sworn, deposes that:

(1) Affiant does hereby state neither the proposer nor any of the proposer's officers, partners, owners, agents, representatives, employees, or parties in interest, has in any way colluded, conspired, agreed, directly or indirectly with any person, firm, corporation, or another proposer, or potential proposer, to provide any money or other valuable consideration for assistance in procuring or attempting to procure a contract or fix the prices in the attached proposed or the proposal of any other proposer, and further states that no such money or another reward will be hereinafter paid.

(2) Affiant further states they have neither recommended nor suggested to Hidalgo County or any of its officials or employees, any of the terms or provisions set forth in their Request for Proposal and subsequent agreement, except at a meeting open to all interested proposers, of which proper notice was given.

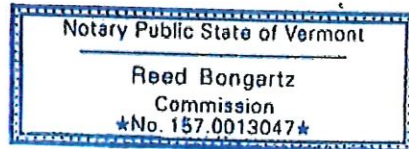
(3) Affiant, further states their officers, employees, or agents have not, and will not attempt to lobby, directly or indirectly, the Hidalgo County Commissioner's Court between proposal submission date and award by the Hidalgo County Commissioner's Court.

(4) Affiant further states ~~no officer, or stockholder of the proposer~~ is a member of the staff, or related to any employee of Hidalgo County ~~except as noted herein below:~~

Signature/Title:  President & CEO

Subscribed and sworn to before me this 15th day of Nov., 2022.


Notary Public

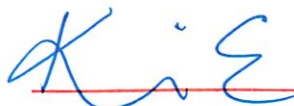


My commission expires: JAN. 31, 2023

OPENED

11/14/22
2:06pm

Witnessed



INSURANCE REQUIREMENT ACKNOWLEDGEMENT

I, Daniel Marsh III, authorized representative for National Council for Community Development, Inc. dba National Development Council
Company/Vendor

hereby acknowledge receipt of the County's required insurance limits. Said requirements:

- ✓ will be acquired within 10 working days after notification from Purchasing Department of award of the project by the Hidalgo County Commissioners' Court;
- will acquire additional amount needed to meet the County's requirements within 10 working days after notification from Purchasing Department of award of the project by the Hidalgo County Commissioners' Court; currently carry the following:

Professional Liability (Errors & Omissions): \$ _____
 Automobile Liability: \$ _____ General Liability: \$ _____

- have already been met, see attached copy of certificate of insurance.

DocuSigned by:

 RR07FDC:F0F1R48B
 Authorized Representative

11/15/2022
 Date

NOTICE TO BIDDER:

A certificate of insurance for the required insurance limits shall be provided to the Purchasing Department in order to qualify for award of the project and to execute a contract between your Company and the County.

Failure to provide Certificates of Insurance to the Purchasing Department's Contract Managers will cause the award of the project to be rescinded and then re-awarded to next qualified vendor. Certificates of Insurance will be monitored and verified on a **quarterly basis** to ensure coverage policy is in place. It is the Company's obligation to maintain the appropriate insurance coverage throughout the term of the contract.

THIS FORM MUST BE ACCOMPANY YOUR RESPONSE

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session. This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.
National Council for Community Development, Inc.
dba National Development Council

2 Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

None. Not Applicable.
Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7 DocuSigned by:
Daniel Marsh III
2007.DCC01143E
Signature of vendor doing business with the governmental entity

11/15/2022
Date

Contractors who apply or bid for an award of \$100,000 or more shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient.”

APPENDIX A, 44 C.F.R. PART 18 – CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

(To be submitted with each bid or offer exceeding \$100,000)

National Council for Community Development, Inc.

The undersigned Contractor, dba National Development Council certifies, to the best of his or her knowledge, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an 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.
2. 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 of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form- LLL, “Disclosure Form to Report Lobbying,” in accordance with its instructions.
3. The undersigned 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 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). 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.

National Council for Community Development, Inc.

The Contractor, dba National Development Council, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 *et seq.*, apply to this certification and disclosure, if any.

DocuSigned by:
Daniel Marsh III
30379CC071442E
Signature of Contractor’s Authorized Official

Daniel Marsh III, President & CEO
Name and Title of Contractor’s Authorized Official

11/15/2022
Date”

Laura Salinas-Martinez
Operations Support Director
1808 S Good Latimer Expressway
Dallas, Tx 75226
Tel: (210) 314-9860
Email: lsalinas@ndconline.org

Professional Summary

Experienced affordable housing and community development professional with vast working knowledge of operations, federal funding requirements, policy development, programmatic implementation, contract negotiations, affordable rental and homeownership housing development, and organizational leadership.

2020-Present

National Development Council, Dallas, Texas

- Responsible for providing support to the Training and Technical Advisory Support Division by creating consistency and standardization in business operations.

2010-2020

City of San Antonio, San Antonio, Texas

Grants Administrator

- Full management responsibility of HUD entitlement funding with current balances over \$31 million to include the annual planning processes, policy development, budget development, project selection, programmatic implementation, financial and performance reporting, contract negotiation and execution, compliance monitoring, and coordination with HUD.
- Lead for the COVID-19 Emergency Housing Assistance Program Processing Team which included development of process mapping, personnel planning, policy development, training and development, programmatic implementation, performance reporting, invoicing, and compliance sampling and monitoring to ensure compliance with and timely expenditure of CARES Act funding.
- Responsible for the annual development and approval of the \$21 million CDBG and HOME budgets and \$3.3 million administrative budget.
- Responsible for the request for council action process to include agenda memo preparation, funding schedules, approval sequencing, presentations, council briefings, and providing support to the Director and presenting to council subcommittees and Housing Commission (when needed).
- Responsible for the Request for Applications/Qualifications process for affordable rental and homeownership housing development and professional services to include application development, project selection, development budget and pro forma review, funding award, contract negotiation, contract execution and contract compliance. Manage the development and implementation of performance goals, policies and priorities for the Grants Monitoring and Administration Division.
- Monitored and evaluated the efficiency and effectiveness of policies and procedures and identified opportunities for improvement and direct implementation.
- Managed strong working relationships with internal and external customers, responded to Executive Leadership regarding sensitive inquiries or high priority tasks, and facilitated connections and provided technical assistance to the Community Housing Development Organizations (CHDOs).

- Responsible for personnel planning, hiring, onboarding, training and development, project prioritization and Employee Performance Evaluations for a division of 16 employees.
- Provided staff support to the Mayor's Housing Policy Taskforce for the development of the Housing Policy Framework.
- Since September 2010, held the following positions within the Grants Monitoring and Administration Division: Grants Manager, Contract Manager, Senior Management Analyst and Management Analyst. Also served as the Interim Assistant Director of the Planning and Community Development Department in late 2016 and the newly-formed Neighborhood and Housing Services Department in 2018.

1999-2010

Affordable Housing & Community Development Entities, Yakima, Washington & San Antonio, Texas

Various Professional Roles

- Developed the \$16 million Annual Operating Budget to include revenue estimation, analysis of contractual obligations, budget formulation, budget amendments, budget adoption and execution.
- Maintained the five-year Capital Improvement Plan budget of \$58 million.
- Oversaw HUD-funded homeownership and home rehabilitation programs.
- Provided housing counseling for program participants and facilitated/taught Homebuyer Education, Financial Management, and Home Maintenance Workshops.

2015-2017 | 2008-2009

Rigel Realty | SYLIS Real Estate, San Antonio, Texas

Realtor

- Assisted buyers and sellers of residential real estate in every step of the real estate transaction to include contract development, negotiation, execution and amendments.
- Conducted comparative market analyses in target neighborhoods to aid the seller in setting a list price or the buyer in setting the offer price.
- Provided clients with referrals to lenders, inspectors, insurance agents, title companies, and any other real estate professionals involved in the transaction.
- Member of the San Antonio Board of Realtors, Texas Association of Realtors and the National Association of Realtors.

Education

St. Mary's University, San Antonio, Texas
Master of Business Administration

Heritage College, Toppenish, Washington
Bachelor of Business Administration

Texas Real Estate Commission
Real Estate Sales License #582276 (Inactive)

Maureen Milligan

National Development Council

Tel: 469-463-9620 Email: mmilligan@ndconline.org

EXPERIENCE

Director

National Development Council, 2020-Present

Dallas, TX

Providing technical assistance to clients regarding all aspects of economic development and housing strategy, including conducting market analyses and helping clients design, implement, fund, and assess their programs. Providing training to clients regarding housing development and finance. Helping cities and counties administer nearly \$50M in funding for emergency rental and small business assistance.

Assistant Director

Dallas Department of Housing & Neighborhood Revitalization, 2018-2020

Dallas, TX

Managed a team of community development professionals who facilitated home repair, mortgage assistance, housing development and land bank programs that used funding sources including CDBG and HOME grants, general obligation bonds, and municipal general funds. Led the implementation of the City of Dallas's first comprehensive housing policy, including drafting ordinances, program statements, and procedures related to incentive zoning, housing tax credits, community land trusts, tangled titles, neighborhood empowerment zones and strategic land acquisition/disposition. Established and managed the Housing Policy Taskforce, which engaged industry professionals, neighborhood leaders, and city staff in policy development at both the local and state level. Helped draft competitive solicitations for the development and rehabilitation of mixed-income single- and multi-family housing developments. Successfully assisted the City in obtaining its first competitive HUD grant (Lead Hazard Control and Healthy Homes). Prepared and presented City Council committee briefings and agenda items and worked closely with elected officials and city staff.

Special Advisor to the Dallas Department of Housing & Neighborhood Revitalization, 2018

Executive Assistant City Attorney, Chief of Community Prosecution

Dallas City Attorney's Office, 2014-2018

Dallas, TX

Managed two distinct teams: (1) a neighborhood-based team of 16 attorneys who engaged in civil nuisance abatement litigation and criminal prosecution of city ordinance violations in state district court and municipal court and (2) a team of 12 social workers and community restitution coordinators who staffed the city's problem-solving municipal courts, including the South Dallas Drug Court and the South Oak Cliff Veteran's Treatment Court. Co-managed a multi-departmental team of 49 persons (16 attorneys, 12 code officers, 7 fire prevention officers, 7 police detectives, and 7 administrative support personnel) who were collectively responsible for engaging in creative problem-solving strategies aimed at stabilizing communities by improving public safety and reducing blight. Was responsible for a budget of approximately \$2.5 million including JAG, CDBG, and SAMHSA funds. Responded to requests for assistance from city council members, the mayor's office, city departments and neighborhood stakeholders. Assisted in drafting and leading the implementation of new city ordinances, including the Minimum Property Standards and Habitual Criminal Properties ordinances. Drafted a bill that amended the Texas Estates Code, prepared supporting documentation, and testified before the Texas House Judiciary & Civil Jurisprudence Committee.

Senior Assistant City Attorney, Deputy Chief of Community Prosecution, 2011-2014

Assistant City Attorney, Jubilee Park Community Prosecutor, 2007-2011

Law Clerk

Judge William F. Sanderson Jr., U.S. District Court, Northern District of Texas, 2005-2007

Dallas, TX

Drafted reports and recommendations, memorandum opinions, jury charges and research memos for review by the judge. Frequently conducted research on discovery matters, state and federal habeas corpus petitions, social security appeals and employment discrimination claims. Assisted judge during civil and criminal hearings.

Librarian

Baltimore City Public Schools, 2001-2002

Baltimore, MD

Designed and implemented library-media curriculum for four hundred students in grades Pre-K through 6th. Founded after-school literacy program. Facilitated donation of over 60 functioning computers to the school.

First Grade Teacher

District of Columbia Public Schools, 1999-2001

Washington, DC

Instructed six-year-olds in reading, math, social studies, and science. Served as school spelling bee chair. Formed partnership with Duke University Alumni club. Facilitated numerous volunteer activities.

EDUCATION

American University, Washington College of Law

Washington, DC

Juris Doctor, *cum laude*, 2005

The University of Virginia, Curry School of Education

Charlottesville, VA

Master of Education, 2002

Duke University, Trinity College of Arts and Sciences

Durham, NC

Bachelor of Arts, *Distinction in English*, 1999

CERTIFICATIONS

Economic Development Finance Professional, National Development Council, 2020

COMMUNITY INVOLVEMENT AND LEADERSHIP

Sustaining Member, Junior League of Dallas, 2006-Present

Active Member, Dallas Rotary Club, 2014-Present

Board Member, Lone Star Justice Alliance 2020-Present

Board Member, Teach for America Dallas-Fort Worth Alumni Board, 2017-2019

Participant, Junior League of Dallas T. Boone Pickens Leadership Institute, 2009-2010

Participant, Dallas Association of Young Lawyers Leadership Class, 2007-2008

TRAINING AND SPEAKING ENGAGEMENTS

Caruth Police Leadership Institute, 2016-2018

Trainer, Internal Procedural Justice

Trainer, Procedural Justice I & II

Reclaiming Vacant Properties Conference, Center for Community Progress, 2013 & 2016

Speaker, Market-Informed Decision-Making for Strategic Code Enforcement

Trainer, Teamwork Makes the Dream Work: Uniting Code Enforcement, Police, Prosecution and Courts to Improve Community Safety and Combat Blight

National Community Prosecution Conference, Association of Prosecuting Attorneys, 2013 & 2014

Speaker, Community Prosecution 101

Crime Prevention Through Environmental Design, National Crime Prevention Council, 2011 & 2016

Trainer, Strategies for Addressing Abandoned and Foreclosed Properties

Monifa K. Watson, MPA

Grow America Fund, Portfolio Manager

8064 Revere Drive

McDonough, GA 30252

Tel: (678) 583-1575

MWatson@nationaldevelopmentcouncil.org

Professional Summary

- *Community Economic development professional specializing in the area of small business financing*

2011 – Present

National Development Council/Grow America Fund, New York, NY

Regional Program Manager – Multi-Cultural Community Investment

- Promote and market NDC products and services to traditionally underserved communities and populations
- Develop relationships and partnerships with organizations, individuals, business owners and various stakeholders in metro Atlanta and other cities within the southern region.
- Conduct NDC Training classes as needed
- Maintain and update MCI partner database and pipeline report

Portfolio Manager

- Maintain accurate and complete servicing files
- Conduct site visits to each borrower at least once a year
- Perform written annual reviews of borrower performance
- Attends (and provides input to members of) the Loan Committee
- Monitor tickler system for renewals and payments of borrower insurance policies and property tax payments
- Monitor and implement collection procedures, late notices and default letters
- Notify and/or seek SBA approvals for all changes of collateral, borrower and loan attributes
- Create and implement, after approval, workout plans for borrowers experiencing short-term cash flow problems
- Create and implement, after approval, liquidation plans for borrowers for whom workout plans were not successful and delinquencies and default conditions continue
- Oversee and monitor litigation plans set up by attorneys and communicates it to appropriate SBA offices
- Approve disbursement of funds not disbursed at closing

2008

Housing Initiative of North Fulton (HomeStretch), Roswell, GA

Program Director

- Developed, evaluated and maintained Program Policy and Procedures for Emergency and Transitional Housing Facilities
- Created and implemented Life Skills curriculum for Youth and Adults
- Managed Volunteer Staff
- Responsible for Program Development: Fundraising, grant writing and reporting
- Ensured compliance with accreditation and donor guidelines
- Created and submitted various reports as the Board and Executive Director request
- Oversaw Program Department budget
- Managed the receipt and distributions of in-kind gifts for clients
- Supervised Program Staff to ensure service delivery to families
- Performed Program marketing and core messaging; updated program content on website; newsletter contributor
- Represented HomeStretch at United Way functions, community groups, and various speaking engagements
- Coordinated Events

2005

Consumer Credit Counseling Service, Atlanta, GA

Financial Literacy Program Director

- Managed the Consumer Credit Counseling Service satellite office at The Villages of Eastlake
- Organized and coordinated all administrative functions
- Conducted market research on the financial needs of constituents
- Performed individual counseling sessions for Eastlake residents
- Taught Adult and Youth Financial Literacy Class
- Promoted, marketed and conducted community wide financial literacy seminars and workshops
- Responsible for external and internal compliance reporting
- Responsible for logistics, effective communication for and timely follow-up of stakeholders meetings
- Collaborated with other non-profits for maximum program effectiveness and sharing of resources
- Managed program budget
- Recruited and supervised staff

Housing Education Team Leader/Certified Housing Counselor

- Created and facilitated Housing Education seminars and workshops for first time homebuyers
- Developed and Managed Company's Housing Education schedule
- Oversaw Housing Education staff – paid and volunteer
- Responsible for external and internal compliance reporting
- Marketed Housing Education to potential clients and funders
- Cultivated and nurtured relationships with partners and sponsors

Community Outreach/Certified Credit Counselor

- Created and facilitated Financial and Housing Education seminars and workshops for clients.
- Marketed education services to potential clients and funders
- Responsible for internal reporting

Education

Metropolitan College of New York
Master of Public Affairs

Baruch College - The City University of New York
National Urban Fellow

Spelman College
Bachelor of Science, Economics

Volunteer Experience

SheStems Girls Empowerment, Inc., Stockbridge, GA
Board of Directors

Locust Grove High School Band Boosters
President

Patricia Santa Cruz

Field Director

1808 S. Good Latimer Expressway
Dallas, TX 75226

Tel: (281) 772-0733

Email: psantacruz@ndconline.org

Experience

National Development Council, Central Team Field Director, San Antonio, TX (2021-Present)

- Provides technical assistance and training on federal, state, and local community development and housing programs to local governments.

Grants Manager/ Interim Grants Administrator, City of San Antonio, Neighborhood and Housing Services Department, San Antonio, TX (2012-2014; 2015-2021)

- Developed and deployed an annual federal budget of \$21 million for U.S. Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) and HOME Investment Partnerships Program (HOME) funds.
- Successfully completed the City's FY 2022-2026 Five-Year Consolidated Plan to secure funding of approximately \$111 million in CDBG, HOME, Health Emergency Solutions Grants (ESG) and Housing Opportunities for People with AIDS (HOPWA) funds.
- Successfully managed \$17 million in CDBG Coronavirus Aid, Relief, and Economic Security (CARES) Act funding to ensure timely expenditure of 95% of funding by October 2021.
- Assisted with the implementation, policy development and monitoring of the City's \$140 million COVID-19 Emergency Housing Assistance Program funded with CARES Act and other federal and local funds.
- Managed all operational aspects of CDBG and HOME programs to include administrative and project budget development and oversight, project management, policy development, program monitoring, fiscal monitoring of grant funds and program income, and reporting and contract compliance.
- Managed the environmental review process to ensure compliance with the National Environmental Policy Act for all HUD funded projects located within the City of San Antonio's jurisdiction subject to HUD Part 58 and Part 50 regulations.
- Managed the citizen participation process to include development of public notices and coordination of public hearings and public meetings to ensure compliance with HUD consolidated plan requirements.
- Deployed all Notice of Fund Allocations and Grant Award Notices for all federally funded grant activities to City departments and external affordable housing non-profits.
- Developed and obtained HUD approval for the Annual Action Plan and Substantial Amendments, Consolidated Annual Performance and Evaluation Report, NSP plans/reports, and Section 3 reports.
- Monitored all activity and program expenditures to ensure the city met its HOME and CDBG programmatic requirements and timeliness, commitment, expenditure, and draw down deadlines.
- Provided grant management and oversight of the City's HUD funded programs including but not limited to the Owner-Occupied Rehab Program, Minor Repair Program and Façade Improvement Program to ensure programs' policies and procedures met applicable federal administrative and programmatic requirements and expenditure deadlines.
- Initiated project/activity set-up and funding of all CDBG and HOME activities in HUD's Integrated Disbursement and Information System (IDIS) ensuring compliance with HUD requirements.
- Provided technical assistance, training, and fund management to internal city departments and subrecipients implementing CDBG and HOME projects.
- Primary point of contact for HUD grant programs and for external audits (single audit and HUD).
- Responsible for eligibility determination of new CDBG, HOME & NSP activities.
- Prepared agenda memos and presentations and coordinated agenda items for council consideration.
- Assisted in the development of RFQs and RFPs for CDBG, HOME, and NSP activities and evaluated applications to select and award eligible housing projects.
- Led the development of the department's 2-Year Equity Action Plan.

- Provided support and technical assistance for other department housing initiatives including the Strategic Housing Implementation Plan and Risk Mitigation (Anti-Displacement) Program.
- Previous roles at the City of San Antonio's Neighborhood and Housing Services Department include management analyst, senior management analyst, and compliance senior analyst.

Project Analyst, Bexar County, Department of Community Resources, San Antonio, TX (1994-1997; 2009-2012; 2014-2015)

- Monitored project construction and payment records for programs to ensure compliance with federal regulations.
- Prepared application analysis information for CDBG and HOME eligible projects.
- Coordinated and monitored contracts and project budgets including CDBG infrastructure, public facilities and public services projects and HOME affordable housing projects (Housing Rehab Program, Tenant Based Rental Assistance Program, and Multifamily Development).
- Initiated project/activity set-up and funding of all CDBG and HOME activities in HUD's Integrated Disbursement and Information System (IDIS) ensuring compliance with HUD requirements.
- Monitored all activity and program expenditures to ensure the County met its HOME and CDBG programmatic requirements and timeliness, commitment, expenditure, and draw down deadlines.
- Maintained detailed financial records to identify funds available for reprogramming.
- Facilitated public hearings and public meetings.
- Prepared Requests for Proposals and Invitation for Bids documents for project implementation and contracts for CDBG, HOME and EECBG program projects.
- Developed performance reports for Department of Energy (DOE) Energy Efficient and Conservation Block Grant (EECBG) projects funded by the American Recovery and Reinvestment Act (ARRA).
- Managed, facilitated, and coordinated the EECBG program as the lead analyst responsible for maintaining project documents, budget, program compliance/reporting, and data collection.
- Evaluated developer applications for HOME and housing programs including evaluation of developer applications submitted for County support of tax credit housing projects.
- Previous roles at the Bexar County include caseworker and caseworker supervisor.

Senior Director of Housing and Energy Management, Sheltering Arms Senior Services, Houston, TX (1997-2004)

- Administered the federally funded Weatherization Assistance Program and Comprehensive Energy Assistance Programs (U.S. Low Income Home Energy Assistance Program) with an annual budget of \$7 million provided by the Texas Department of Housing and Community Affairs.
- Managed the Centerpoint Energy Energy-Efficiency Program and City of Houston's CDBG Emergency Home Repair Program.
- Established priorities and processes for providing service delivery and complying with state and federal guidelines.
- Developed service delivery plans, budgets, reports, and policies for department programs.
- Served as the agency liaison for state funding source, utility vendors, and other social service agencies.
- Previous roles include case worker supervisor and manager.

Education

Texas Tech University, Lubbock, TX
Bachelor of Science, Human Sciences

Professional Development

City of San Antonio Management Development Institute, 2019
National Community Development Association (NCDA) Member, 2013-2021
NCDA 2021 Winter Virtual Conference, Presenter
NCDA 2019 Annual Conference, Presenter

Raquel Favela
Sr. Executive Vice President
Tel: (210) 215-0707
rfavela@ndconline.org

Professional Summary

Ms. Favela is a recognized expert in economic development and housing with 25 years of experience. As Senior Executive Vice President at the nation's oldest non-profit technical advisory services firm, National Development Council (NDC), she leads the Training & Technical Advisory Services Team in helping clients understand their markets and develop customized strategic plans and policy solutions that build eco-systems critical to the creation of equitable job, small business and diverse housing options. A thought leader and authority, she has walked in the shoes of most of the major participants in real estate development: owner, investor, developer, consultant, governmental entity, lender and landlord. Known for delivering results, while at the City of San Antonio, Raquel is credited with producing San Antonio's first Strategic Community Development Plan in 2007. In 2018, while serving as the City of Dallas' Chief of Economic Development and Neighborhood Services, Raquel was lauded for delivering the city's first Comprehensive Housing Policy and Strategic Plan that addressed longstanding fair housing and disparate impact issues. Her unique brand of expertise in financing & real estate development join her long-range planning acumen to bring balanced problem solving to communities.

2018-Present

National Development Council, New York, NY

Sr. Executive Vice President, Training & Technical Advisory Services

- Leads team of housing and economic development technical advisors serving clients throughout the United States
- Assists clients in helping understand markets with granularity that allows them to more precisely use and leverage local, state and all federal housing and economic development financing tools
- Certified Housing and Economic Development Finance Professional
- Instructor in NDC's Housing and Economic Development Finance Professional Certification Series

2017-2018

City of Dallas, Dallas, TX

Chief of Economic Development & Neighborhood Services

- Oversee the departments of Planning & Urban Design, Housing & Neighborhood Revitalization, Offices of Economic Development, Code Compliance, and Office of Fair Housing and Human Rights (Direct reports, with over 660 FTEs; combined portfolio budget of over \$850 million)
- Resolved thirty-two longstanding internal and federal audit findings
- Resolve legal issues ruled on by the Supreme Court of the United States to bring the City into compliance with affirmatively furthering fair housing laws and the Americans with Disabilities Act.
- Managed the assessment and transition of twelve top tier executives and recruited qualified replacements
- Led housing policy town halls that resulted in the development of the City's first comprehensive housing policy and rolling strategic plan to address the housing shortage crisis
- Provide a transparent and consistent set of underwriting guidelines and uniform incentive application
- Secured corporate sponsorship to provide professional certification training for nearly 100 employees and local non-profit partners in financial underwriting valued at \$380,000
- Procured the consultant team to complete the City's first Strategic Economic Development Plan in twenty years

2007-2017

National Development Council, New York, NY

Midwest Field Director

- Provided technical assistance, training and financing to governments for real estate development projects utilizing Neighborhood Stabilization Program, New Market Tax Credits, Low Income Housing Tax Credits, Tax Increment Financing, HUD 108 Loans and other public financing mechanisms.
- Served as course instructor of Housing Development Finance and Economic Development Finance Professional Certification Programs.
- Served as advisor to city, county, state, federal, housing authorities and quasi-governmental entity officials on organizational, operational, programmatic and community relations related to housing, economic and community development.
- Sample client list: City of San Antonio, Texas; City of New Braunfels, Texas; City of Rockford, Illinois; Los Angeles County Community Development Commission; State of Illinois Department of Commerce and Economic Opportunity; City of East Chicago, Indiana; San Antonio Housing Authority; Laredo Housing Authority; City of El Paso, Texas; City of Normal, Illinois; City of Shreveport, Louisiana; City of New Orleans, Louisiana; City of Westminster, Colorado; Madison County, Illinois; City of San Angelo, Texas; Gainesville Community Redevelopment Authority, Florida; Prichard Housing Authority, Alabama;

2007-2007

Planning & Community Development Director, San Antonio, TX

City of San Antonio Assistant Director

- Designed and implemented the City's first three-year strategic plan for community development and implementation of reinvestment plans designed to encourage sustainable development in transitional areas of the city.
- Oversaw for the absorption of a fifty-year-old Urban Renewal and Redevelopment Agency, including assessment, financial reconciliation and transfer of all assets and liabilities.
- Implemented and managed reorganization of support staff teams geared toward results.

1998-2002

Neighborhood Action Department, San Antonio, TX

Special Projects Coordinator

- Responsible for management of projects designed to serve the needs of specific communities, enhance the appearance of neighborhoods, and improve neighborhood-based services.
- Coordinated neighborhood service delivery.
- Developed of project timetables from initial stage through implementation.
- Conducted neighborhood meetings, which promoted departmental activities and developed project needs for implementation.
- Analyzed issues related to scheduling, legalities, funding limitations, creating distinct service areas, etc. and provided findings and recommendations.
- Worked extensively with City departments to develop and implement projects including serving on various committees, giving direction to other staff members and providing feedback to the Director.
- Coordinated activities with City departments, private sector entities, community leaders, representatives and other affected stakeholders.
- Maintained oversight and accountability through neighborhood follow-up meetings to answer questions and log work not completed, including providing handbooks of city services and community service logs to civic leaders for ongoing use.

1996-1998

Southwest Voter Registration Education Project, San Antonio, TX

Regional Field Coordinator

- Organized and managed 300 voter registration and Get Out The Vote (GOTV) projects throughout Texas, Colorado, California and New Mexico.
- Hired staff and established operating budgets for each project.
- Monitored performance and managed all finances for all projects.
- Organized and led meetings with elected officials, community leaders, and candidates from each region to develop a strategy for the upcoming election cycle.
- Prepared performance and budget reports for each project.

1996-1997

Catholic Charities of San Antonio, Inc., San Antonio, TX

Program Coordinator

- Structured a naturalization program with services that consisted of application processing, civics classes, civics testing, accredited representation and provided specialized services to elderly and disabled clients.
- Recruited and trained volunteers, solicited additional funding, held informational and pre-screening sessions for potential clients and increased the visibility of the agency.
- Developed a successful internship program with local universities.
- Achieved an effective outreach program by convincing a local radio personality to allow me to host a one-hour call-in show twice a week.
- Maintained ongoing familiarity with federal regulations/laws related to immigration, welfare and naturalization.

1994- 1994

Neighborhood Housing Services of San Antonio, Inc., San Antonio, TX

Assistant Community Development Planner

- Assisted in land assembly and acquisition for affordable housing developments, teaching homebuyer education classes, creation of by-laws for newly formed neighborhood associations, wrote grant proposals and created reports for underwriters.

HONORS & DISTINCTIONS

- NDC Trainer of the Year, 2016
- Robert L. Woodson, Jr. Award Affordable Showcase of Homes, 2005
- Innovations in American Government, Harvard School of Government, Neighborhood Sweeps, 1999
- NAHRO, Innovations Award, Tax Increment Financing Program, 2006