

---

**File ID:** 2026-00606

3/10/2026

---

**Authorization for Sacramento Housing and Redevelopment Agency (SHRA) to enter into a Memorandum of Understanding (MOU) with the County of Sacramento Related to Contracts with CVR Associates, Inc. and Payment of Costs Associated with a Contract for Sacramento Housing and Redevelopment Agency Assessment**

File ID: 2026-00606

**Location:** Citywide

**Recommendation:** Adopt a **City Council Resolution** authorizing Sacramento Housing and Redevelopment Agency (SHRA) to enter into a Memorandum of Understanding (MOU) with the County of Sacramento related to contracts executed with CVR Associates, Inc. and paying for costs associated with a contract for Sacramento Housing and Redevelopment Agency Assessment and associated travel expenses for the Executive Director.

**Contact:** Ya-yin Isle, City Housing Manager, (916) 808-1869, [yisle@cityofsacramento.org](mailto:yisle@cityofsacramento.org), City Manager's Office of Innovation and Economic Development; Michael Jasso, Assistant City Manager, (916) 808-1380, [mjasso@cityofsacramento.org](mailto:mjasso@cityofsacramento.org), City Manager's Office; James Shields, Deputy Executive Director, (916) 440-1308, [jshields@shra.org](mailto:jshields@shra.org), Sacramento Housing and Redevelopment Agency

**Presenter:** None.

**Attachments:**

- 1-Description/Analysis
- 2-City Council Resolution
- 3- MOU between the County of Sacramento and SHRA
- 4-Contract between County of Sacramento and CVR Component A

**Description/Analysis**

**Issue Detail:** In 1982, the Sacramento Housing and Redevelopment Agency (SHRA) was established through a Joint Powers Agreement (JPA) between the County of Sacramento and the City of Sacramento (City) pursuant to California Government Code § 6500, et seq. SHRA was created to centralize and streamline housing and redevelopment efforts across both jurisdictions and currently serves as the primary administrator of federal, state, and local housing and community development programs.

SHRA operates with oversight provided by both the Board of Supervisors (Board) as the County and the Housing Authority of the County of Sacramento, and the Sacramento City Council (Council) as the City and the Housing Authority of the City of Sacramento. Each body retains authority over SHRA programs and funding decisions within its respective jurisdiction. SHRA also has an 11-member Housing Commission that serves as an advisory body for some items before they move to the Board or Council and has final decision-making authority for particular items, mostly related to Public Housing administration, that the Board and Council have delegated to this Commission. This structure was intended to ensure shared governance and equitable resource allocation.

In August of 2025, the Board of Supervisors directed the County Executive to obtain an outside assessment of SHRA governance and operations to determine if there are process improvements that could strengthen the organization and collaboration with jurisdictions and partners. In October of 2025, the longtime Executive Director of SHRA retired from her position and an Acting Director from within SHRA's ranks was appointed, as approved by the Board of Supervisors and City Council. The County launched a Request for Proposals (RFP) process to bring on a consultant to perform the assessment and to seek an Interim Executive Director that could lead the organization pending the finalization of the assessment.

City staff participated with the County during the selection process of both the Executive Director and consultant; and CVR Associates, Inc. (CVR), an incorporated entity, was the highest ranked firm to demonstrate expertise in housing policy, organizational assessments to provide consulting services. As such, CVR was selected to provide the services as outlined in the Agreement for Component A: Consulting Services for SHRA Assessment.

The attached resolution authorizes SHRA to enter into a Memorandum of Understanding with the County of Sacramento related to the agreement that the County will execute with CVR, for SHRA to reimburse the County for the costs associated with the agreement as follows:

- 1) CVR Contract Component A - Consultant services for SHRA organizational assessment, to be billed on a task basis with a total amount not to exceed amount of \$650,000. (Note: The contract allows for an amendment to increase the maximum compensation amount of no more than 10% of the annual payment, \$65,000 for a total of \$715,000 if amended.)

The SHRA funds allocated for this assessment agreement are split 50/50 between City and County SHRA funds, and are all administrative funds and not project funds, with no impacts to City or County projects.

The scope of work included the activities and deliverables a qualified consultant would carry out to help the SHRA governing bodies better understand SHRA's functions and oversight structure and

identify ways to strengthen alignment and support for its goals. CVR's response to the RFP and a full description of services are included as a part of Attachment 4-Contract between County of Sacramento and CVR Component A. Key areas of focus include:

- Strategy 1: Evaluate the Housing Authority's public housing choice voucher programs, identifying opportunities to strengthen those programs within the parameters of meeting HUD regulations and guidelines, reducing barriers to accessing Housing Authority services, and aligning and integrating with community efforts to address homelessness.
- Strategy 2: Assess SHRA's housing finance and community development processes and policies to enhance coordination and transparency in affordable housing development and financing, with the aim of expanding and diversifying housing options and funding strategies.
- Strategy 3: Review and delineate the roles and responsibilities of SHRA's oversight bodies, ensuring the SHRA governing bodies have the information and authority needed to provide effective oversight of SHRA's operations.

CVR's proposed scope of work seeks to provide services for the three strategies in four phases of work:

- Phase 1: Project Mobilization and Stakeholder Engagement. This phase includes a kickoff meeting, stakeholder identification, engagement interviews, focus groups to gather qualitative and quantitative data and feedback from stakeholder groups. During this phase, a joint meeting of the Board of Supervisors and City Council members could be held to review the scope of work and gather feedback collectively and individually.
- Phase 2: Assessment and Data Collection. This phase focuses on review and analysis of policies, procedures, program data, and other relevant records; creation of detailed process maps for interactions with SHRA systems, and a comparative analysis of processes and policies against peer agencies.
- Phase 3: Program Evaluation and Analysis. This phase of work includes assessing operational efficiency, compliance with HUD guidelines for public housing and voucher programs; analysis of the housing finance and development processes, policy documents, and opportunities for enhanced coordination; and review of the roles and responsibilities of SHRA's governing bodies, reporting requirements and decision-making structures.
- Phase 4: Recommendations and Reporting. During this phase a draft report with individual comprehensive reports for each strategy including actionable recommendations for program enhancement, process improvements, and governance alignment would be presented for feedback and refinement, with a final report including implementation guidance, detailed action

steps, accountability measures, and roadmap for continuous improvement. This report and recommendations would include detailed data, numbers, and key metrics for voucher processes, staffing of key functions of SHRA, amount invested, units produced and the impacts of HUD funding cuts and recommendations.

The budget for the scope of work is as follows:

<b>Compensation Summary</b>	
Strategy 1	\$225,000
Strategy 2	\$150,000
Strategy 3	\$125,000
Travel Expenses	\$150,000
<b>Total</b>	<b>\$650,000</b>

While the contract for the SHRA Executive Director component is separate from this contract for consulting services for the assessment work, the travel expenses for the SHRA Executive Director are included as part of this contract. The travel expenses, as with the overall budget, are billed on actual work and travel completed at a not to exceed amount listed above.

In addition, while the County of Sacramento is entering into the contract with CVR Associates directly, the ownership and oversight of the consultant and reports, documents and work products will belong to both the County and City of Sacramento. County and City staff will be working closely together to oversee the consultant's work. Should the assessment to be completed by CVR identify additional recommended changes to the governance structure or the JPA Agreement, those would be brought forward to the Board of Supervisors and the City Council in the future.

**Policy Considerations:** The City of Sacramento and County of Sacramento are the two members of the SHRA joint powers authority initially formed in 1982 and therefore the City Council must authorize SHRA to enter into an MOU with the County of Sacramento.

This action is consistent with the 2021-2029 Housing Element Policy H-7.2 Regional Coordination: The City shall coordinate with the region and work with the Continuum of Care, Sacramento County, SHRA, and partner agencies to develop strategies that address homelessness through a shared vision, coordinated programs, and joint funding opportunities.

**Economic Impacts:** Not applicable.

**Environmental Considerations:**

**California Environmental Quality Act (CEQA):** The proposed actions are administrative and fiscal activities and do not make any commitments to, or give approvals for, specific projects or activities

which have the potential to result in either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment. Therefore, the proposed actions do not constitute a project subject to environmental review under the CEQA per Guidelines Section 15378(b). Environmental Review for specific projects will be completed prior to any discretionary action(s) being carried out with regard to such projects.

**National Environmental Policy Act (NEPA):** The proposed actions are administrative and fiscal activities and do not make any commitments to, or give approvals for, specific projects or activities and are exempt under the NEPA per 24 CFR 58.34(a)(2) and (3). Environmental Review for specific projects will be completed prior to any choice limiting action(s) being carried out with regard to such projects.

**Sustainability:** Not applicable.

**Commission/Committee Action:** On January 21, 2026, the Sacramento Housing and Redevelopment Commission adopted a resolution authorizing the Acting Executive Director, or his designee, to execute a Memorandum of Understanding with the County of Sacramento for the Sacramento Housing and Redevelopment Agency to reimburse the County for costs associated with CVR Associates, Inc. consulting and interim executive consulting services, in an amount not to exceed \$1,097,800.

**Rationale for Recommendation:** The approval of the MOU between SHRA and the County of Sacramento is necessary to reimburse the County for the contracted work to conduct an Agency assessment.

**Financial Considerations:** All costs for the consulting services are contained in the SHRA approved 2026 and Subsequent Agency Budgets. There is no cost or impact on the City General Fund.

Within the SHRA budget, the split for the \$650,000 contract amount and 10% budget increase allowance, is split 50/50 between City and County SHRA administrative funds (\$357,500 each City and County SHRA funds for a total of \$715,000). These SHRA City and County funds are all administrative funds and not project funds, with no impacts to City or County projects.

**Local Business Enterprise (LBE):** Not applicable.

## **RESOLUTION NO. 2026-**

Adopted by the Sacramento City Council

### **A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SACRAMENTO AUTHORIZING THE SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY (SHRA) TO ENTER INTO A MEMORANDUM OF UNDERSTANDING WITH THE COUNTY OF SACRAMENTO RELATED TO A CONTRACT WITH CVR ASSOCIATES, INC. AND PAYMENT OF COSTS ASSOCIATED WITH THE CONTRACT FOR CONSULTING SERVICES FOR SHRA ASSESSMENT**

#### **BACKGROUND**

- A. In 1982, the City of Sacramento (City), the County of Sacramento (County), the Housing Authority of the City of Sacramento, the Housing Authority of the County of Sacramento, the Redevelopment Agency of the City of Sacramento and the Redevelopment Agency of the County of Sacramento entered into a Joint Exercise of Powers Agreement (JPA) establishing the Sacramento Housing and Redevelopment Agency (SHRA) for the primary purpose of providing staffing for the City and County Housing Authorities and Redevelopment Agencies.
- B. In 1990, the JPA was amended to include devising, proposing, conducting, evaluating and administrating public social service programs.
- C. In 2011, the California Legislature enacted AB 1X 26, coupled with a subsequent decision of the State Supreme Court (California Redevelopment Association et al., v. Matosantos), resulted in the dissolution of redevelopment agencies as of February 1, 2012;
- D. The County of Sacramento, by Resolution Number 2012-0051 (adopted on January 24, 2012), elected to serve as the Successor Agency to the Redevelopment Agency of the County and designated the Housing Authority of the County of Sacramento as the local authority to retain the housing assets and functions previously performed by the Redevelopment Agency of the County of Sacramento.
- E. The City of Sacramento, by Resolution Number 2012-018 (adopted on January 31, 2012), elected to serve as the Successor Agency to the Redevelopment Agency of the City and designated the Housing Authority of the City of Sacramento as the local authority to retain the housing assets and functions previously performed by the Redevelopment Agency of the City of Sacramento.
- F. The County in August 2025 identified the need for a consultant to implement specific deliverables and provide recommendations aimed at enhancing the collaboration and

effectiveness of SHRA in alignment with County Priorities and subsequently issued a Request for Proposal (RFP) to solicit firms for two services areas: Component A: Consulting Services and Component B: Executive Director services for SHRA.

- G. Component A: Consulting Services will review roles and responsibilities of SHRA, assessment of housing finance lending policies and procedures, assessment of public housing and housing choice voucher functions, and deliver actionable recommendations and implementation guidance (collectively “Consulting Services”).
- H. The City of Sacramento participated in the review and selection panel for the County RFP and CVR Associates, Inc., an incorporated entity, was the highest ranked firm to demonstrate expertise in housing policy, organizational assessments, housing authority functions, and CVR Associates, Inc., was selected to provide such services as outlined in the contract for Component A: Consulting Services.

**BASED ON THE FACTS SET FORTH IN THE BACKGROUND, THE CITY COUNCIL RESOLVES AS FOLLOWS:**

- Section 1. The City Council authorizes SHRA to enter into a Memorandum of Understanding with the County of Sacramento related to a contract with CVR Associates, Inc. and payment of costs associated with the contract for Consulting Services for SHRA Assessment and associated travel expenses for the SHRA Executive Director.

PASSED AND ADOPTED by the City of Sacramento City Council on \_\_\_\_\_, 2026, by the following vote:

Ayes:

Noes:

Abstain:

Absent:

**MEMORANDUM OF UNDERSTANDING BETWEEN  
THE COUNTY OF SACRAMENTO AND  
THE SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY  
FOR PROJECT COORDINATION AND REIMBURSEMENT FOR CONSULTING  
SERVICES FOR SHRA ASSESSMENT**

This Memorandum of Understanding ("MOU") is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 2026, by and between the COUNTY OF SACRAMENTO, a political subdivision of the State of California ("COUNTY"), and the SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY, a joint powers authority ("SHRA").

**RECITALS**

**WHEREAS**, SHRA administers federal housing and community development funds, including funds provided by the U.S. Department of Housing and Urban Development ("HUD"), and may reimburse eligible costs incurred by COUNTY in furtherance of SHRA's federally assisted programs; and

**WHEREAS**, COUNTY conducted a competitive procurement process on behalf of SHRA, and selected CVR Associates, Inc. ("CONSULTANT") to provide Component A: Consulting Services; and

**WHEREAS**, COUNTY pursuant to Resolution No. 2026-0035, authorized the County Executive or their designee(s) to negotiate and execute an agreement for Component A: Consulting Services with CVR Associates, Inc. in an amount not to exceed \$650,000 for the term February 1, 2026 to January 31, 2027; and

**WHEREAS**, COUNTY authorized the County Executive or their designee(s) to further amend and revise the contract for non-monetary changes, monetary decreases, to terminate or assign, and to extend the term as needed for an additional one-year period, and to increase rates of pay shown on Exhibit C by no more than 10% of the total contract amount, so long as budget appropriations are not exceeded; and

**WHEREAS**, COUNTY authorized the County Executive or their designee(s) to accept reimbursement from SHRA for eligible costs incurred under such agreement; and

**WHEREAS**, the COUNTY and SHRA desire to establish roles, responsibilities, and a reimbursement framework consistent with applicable federal, state, and local requirements;

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the parties agree as follows:

**1. PURPOSE AND PROJECT DESCRIPTION**

This MOU establishes a framework under which SHRA will reimburse COUNTY for costs and expenses associated with Component A: Consulting Services, which will review roles and responsibilities of SHRA, assessment of housing finance lending policies and procedures, assessment of public housing and housing choice voucher functions, and to deliver actionable recommendations and implementation guidance (collectively "consulting services"). COUNTY, through its agreement with CONSULTANT, and in partnership with the City of Sacramento ("CITY"), will cause the agreed-upon project services to be performed, and SHRA will reimburse COUNTY for eligible and allowable costs in accordance with applicable HUD federal assistance requirements. Specific scopes of work may be documented in written task descriptions or exhibits.

**2. RESPONSIBILITIES**

A. COUNTY SHALL:

- i. Serve as the sole contracting and administrative entity for services identified under this MOU and under the agreement between COUNTY and CONSULTANT, in partnership with the CITY. COUNTY, through its agreement with CONSULTANT, shall retain responsibility for contract administration, oversight, and acceptance of work products. COUNTY and CITY may coordinate and consult with the Executive Director or other designee(s) of SHRA solely for purposes of project coordination, information sharing, and programmatic input.
- ii. Maintain records sufficiently to support reimbursement requests and provide SHRA true and accurate copies of such records with invoices categorizing each type of cost (including but not limited to compensation, travel, housing, per diem) paid to CONSULTANT and which are being sought by COUNTY for reimbursement.
- iii. Such records shall be made available to SHRA, HUD, and their authorized representatives upon request, as required by applicable federal law.

B. SHRA SHALL:

- i. Reimburse COUNTY only for costs that are eligible, allowable, reasonable, and allocable in accordance with applicable HUD federal assistance requirements, including Title 2 of the Code of Federal Regulations Part 200.
- ii. Review and process reimbursement requests that satisfy the requirements of Section 2.A.ii in a timely manner.
- iii. Provide applicable federal compliance requirements to COUNTY as needed.

### **3. COMPENSATION AND REIMBURSEMENT**

- A. Reimbursement shall be on a cost-reimbursement basis, not to exceed an amount of \$715,000, which includes the contract amount of \$650,000 and an allowance for 10% increase. COUNTY shall submit invoices to designated SHRA contacts (Deputy Executive Director/CFO and Assistant Director of Finance) for the project for processing payment either on a monthly basis, or upon completion of milestones, whichever is later. Reimbursement is subject to the availability of HUD federal assistance and compliance with the requirements applicable to the specific funding source used.
- B. Any increases to the billable rates for CONSULTANT and/or amendments to the Scope of Services under the Agreement shall require a written amendment to this MOU, prior written approval by SHRA, and confirmation of federal allowability.
- C. No advance payments shall be made by SHRA; reimbursement shall be based solely on costs incurred and sufficiently invoiced and documented.

### **4. TERM**

This MOU shall be effective upon execution and shall remain in effect through the completion of services for the agreement, but in no event later than January 31, 2027, unless earlier terminated or extended by written amendment.

### **5. TERMINATION**

Either party may terminate this MOU upon thirty (30) days' written notice to the other party. Termination shall not relieve SHRA of the obligation to reimburse COUNTY for eligible costs incurred prior to termination.

### **6. INDEMNIFICATION**

Except to extent of gross negligence or willful misconduct on the part of Agency, County shall indemnify, hold harmless and defend, to the fullest extent permitted by law, the Housing Authority of the City of Sacramento, the Housing Authority of the County of Sacramento, and the Sacramento Housing and Redevelopment Agency, their respective officers, directors, commissioners, advisory committee members, agents, and employees from liability, claims, demands, attorney's fees or litigation and related costs, including, without limitation, court costs and investigator, witness, arbitrator and mediator fees, for any injury or damages to persons or property resulting from, or otherwise related to this MOU, whether caused, in whole or part, by an intentional or negligent act or omission by County, its officers, employees, or agents.

**7. INDEPENDENT ENTITIES**

Nothing in this MOU creates a partnership, joint venture, or other relationship between the parties.

**8. AMENDMENTS**

This MOU may be amended only by a written document executed by authorized representatives of both parties.

**9. GOVERNING LAW**

This MOU shall be governed by and construed in accordance with the laws of the State of California.

**10. ENTIRE AGREEMENT**

This MOU constitutes the entire agreement between the parties with respect to the subject matter herein.

**11. INCORPORATION**

The County's agreement with CONSULTANT is attached hereto and incorporated herein as Attachment 1 to this MOU. In the event of a conflict between this MOU and the Attachment, the terms of this MOU shall govern with respect to reimbursement and inter-agency responsibilities.

IN WITNESS WHEREOF, the parties have executed this MOU as of the date first written above.

COUNTY OF SACRAMENTO

By: \_\_\_\_\_

Name:

Title:

Date:

SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY

By: \_\_\_\_\_

Name:

Title:

Date:

COUNTY OF SACRAMENTO  
CVR ASSOCIATES, INC.

**AGREEMENT FOR  
Sacramento Housing and Redevelopment Agency (SHRA) Consulting Services**

THIS AGREEMENT is made and entered into on \_\_\_\_\_, by and between the County of Sacramento, a political subdivision of the State of California, hereinafter referred to as "COUNTY" and CVR Associates, Inc, an incorporated entity hereinafter referred to as "CONSULTANT".

**RECITALS**

WHEREAS, COUNTY issued a Request for Proposal to solicit firms in to provide consulting services for the Sacramento Housing and Redevelopment Agency (SHRA) to review roles and responsibilities of SHRA, assessment of housing finance lending policies and procedures, assessment of public housing and housing choice voucher functions, and deliver actionable recommendations and implementation guidance (collectively "Consulting Services"); and

WHEREAS, CONSULTANT was among the highest ranked firms that demonstrated expertise in housing policy, organizational assessments, and housing authority functions to provide Consulting Services, as ranked by a panel of County and City of Sacramento, hereinafter referred to as "CITY" staff; and

WHEREAS, CONSULTANT has proposed to provide the requested services for the compensation identified herein; and

WHEREAS, pursuant to Sacramento County Code Section 2.61.440, the department or agency which has authority to execute this Agreement on behalf of COUNTY has authority to amend this Agreement so as to increase the maximum payment amount, provided that such increase does not exceed 10 percent of the total value of the agreement or \$65,000; and

WHEREAS, while the COUNTY is entering into this contract with CONSULTANT, the CITY as the partner jurisdiction in the Sacramento Housing and Redevelopment Agency joint powers agency, will be an equal partner in this endeavor; and

WHEREAS, COUNTY and CONSULTANT desire to enter into this Agreement on the terms and conditions set forth herein.

NOW, THEREFORE, in consideration of the mutual promises hereinafter set forth, COUNTY, in partnership with CITY, and CONSULTANT agree as follows:

**1. SCOPE OF SERVICES**

CONSULTANT shall provide services in the amount, type and manner described in Exhibit A, which is attached hereto and incorporated herein.

**2. TERM**

This Agreement shall be effective and commence as of the date first written above and shall end on January 31, 2027, with an option to extend up to one additional year (through January 31, 2028) by the County Executive Officer or designee with agreement by the City Manager or designee, at the same rate as specified in Exhibit C hereto,

COUNTY's County Executive Officer, with agreement by the City Manager, are authorized to amend this Agreement to extend the term.

**3. NOTICE**

Any notice, demand, request, consent, or approval that either party hereto may or is required to give the other pursuant to this Agreement shall be in writing and shall be either personally delivered or sent by mail or e-mail, addressed as follows:

TO COUNTY and CITY:

David Villanueva  
County Executive Officer  
County of Sacramento  
700 H Street, Suite 7650  
Sacramento, CA 95814  
[Villanuevad@saccounty.gov](mailto:Villanuevad@saccounty.gov)

Maraskeshia S. Smith  
City Manager  
City of Sacramento  
915 I Street, 5<sup>th</sup> Floor  
Sacramento, CA 95814  
[mssmith@cityofsacramento.org](mailto:mssmith@cityofsacramento.org)

TO CONSULTANT:

Melanie Campbell  
CVR Associates, Inc.  
4501 N. Point Parkway, Suite 260  
Alpharetta, GA 30022  
[melanie@cvrassociates.com](mailto:melanie@cvrassociates.com)

Either party may change the address or e-mail to which subsequent notice and/or other communications can be sent by giving written notice designating a change of address to the other party, which shall be effective upon receipt.

**4. COMPLIANCE WITH LAWS**

- A. CONSULTANT shall observe and comply with all applicable Federal, State, and County laws, regulations and ordinances.
- B. Economic Sanctions: Pursuant to California State Executive Order N-6-22 (“Order”) imposing economic sanctions against Russia and declaring support of Ukraine, COUNTY shall terminate any contract with any individual or entity that is in violation of the Order or that is subject to economic sanctions therein, and shall not enter a contract with any such individual or entity while the Order is in effect.

**5. GOVERNING LAWS AND JURISDICTION**

This Agreement shall be deemed to have been executed and to be performed within the State of California and shall be construed and governed by the internal laws of the State of California. Any legal proceedings arising out of or relating to this Agreement shall be brought in Sacramento County, California.

**6. LICENSES, PERMITS AND CONTRACTUAL GOOD STANDING**

- A. CONSULTANT shall possess and maintain all necessary licenses, permits, certificates and credentials required by the laws of the United States, the State of California, County of Sacramento, and all other appropriate governmental agencies, including any certification and credentials required by COUNTY. Failure to maintain the licenses, permits, certificates, and credentials shall be deemed a breach of this Agreement and constitutes grounds for the termination of this Agreement by COUNTY.
- B. CONSULTANT further certifies to COUNTY that it and its principals are not debarred, suspended, or otherwise excluded from or ineligible for, participation in federal, state, or local government contracts. CONSULTANT certifies that it shall not contract with a subconsultant that is so debarred or suspended.

**7. PREVAILING WAGES**

CONSULTANT shall comply with the provisions of the California Labor Code, specifically, but not limited to, Chapter 1, commencing at Section 1720, of Part 7 of Division 2 (payment of prevailing wages). The prevailing rates for per diem wages shall be those rates determined by the Director of the California Department of Industrial Relations.

**8. PERFORMANCE STANDARDS**

CONSULTANT shall perform its services under this Agreement in accordance with the industry and/or professional standards applicable to CONSULTANT's services.

**9. OWNERSHIP OF WORK PRODUCT**

All technical data, evaluations, plans, specifications, reports, documents, or other work products developed by CONSULTANT provided hereunder shall be the exclusive property of COUNTY and CITY, and shall be delivered to COUNTY and CITY upon completion of the services authorized hereunder. CONSULTANT may retain copies thereof for its files and internal use. Publication of the information directly derived from work performed or data obtained in connection with services rendered under this Agreement must first be approved in writing by COUNTY and CITY. COUNTY and CITY recognizes that all technical data, evaluations, plans, specifications, reports, and other work products are instruments of CONSULTANT's services and are not designed for use other than what is intended by this Agreement.

**10. STATUS OF CONSULTANT**

- A. It is understood and agreed that CONSULTANT (including CONSULTANT's employees) is an independent consultant and that no relationship of employer-employee exists between the parties hereto. CONSULTANT's assigned personnel shall not be entitled to any benefits payable to employees of COUNTY. COUNTY is not required to make any deductions or withholdings from the compensation payable to CONSULTANT under the provisions of this Agreement; and as an independent consultant, CONSULTANT hereby indemnifies and holds COUNTY harmless from any and all claims that may be made against COUNTY based upon any contention by any third party that an employer-employee relationship exists by reason of this Agreement.
- B. It is further understood and agreed by the parties hereto that CONSULTANT in the performance of its obligation hereunder is subject to the control or direction of COUNTY and CITY as to the designation of tasks to be performed, the results to be accomplished by the services hereunder agreed to be rendered and performed, and not the means, methods, or sequence used by CONSULTANT for accomplishing the results.
- C. If, in the performance of this Agreement, any third persons are employed by CONSULTANT, such person shall be entirely and exclusively under the direction, supervision, and control of CONSULTANT. All terms of employment, including hours, wages, working conditions, discipline, hiring,

and discharging, or any other terms of employment or requirements of law, shall be determined by CONSULTANT, and neither COUNTY nor CITY shall have any right or authority over such persons or the terms of such employment.

- D. It is further understood and agreed that as an independent consultant and not an employee of COUNTY or CITY, neither the CONSULTANT nor CONSULTANT's assigned personnel shall have any entitlement as a COUNTY or CITY employee, right to act on behalf of COUNTY or CITY in any capacity whatsoever as agent, nor to bind COUNTY or CITY to any obligation whatsoever. CONSULTANT shall not be covered by worker's compensation; nor shall CONSULTANT be entitled to compensated sick leave, vacation leave, retirement entitlement, participation in group health, dental, life and other insurance programs, or entitled to other fringe benefits payable by the COUNTY or CITY to employees of COUNTY or CITY.
- E. It is further understood and agreed that CONSULTANT must issue W-2 and 941 Forms for income and employment tax purposes, for all of CONSULTANT's assigned personnel under the terms and conditions of this Agreement.

**11. REIMBURSEMENT OF EXPENSES**

Expenses shall be itemized as a separate line item on the monthly invoice for payment. Original receipts are required to be submitted for reimbursement.

**12. CONSULTANT IDENTIFICATION**

CONSULTANT shall provide COUNTY with the following information for the purpose of compliance with California Unemployment Insurance Code Section 1088.8 and Sacramento County Code Chapter 2.160: CONSULTANT's name, address, telephone number, social security number or federal tax identification number, and whether dependent health insurance coverage is available to CONSULTANT.

**13. COMPLIANCE WITH CHILD, FAMILY AND SPOUSAL SUPPORT REPORTING OBLIGATIONS**

- A. CONSULTANT's failure to comply with state and federal child, family and spousal support reporting requirements regarding CONSULTANT's employees or failure to implement lawfully served wage and earnings assignment orders or notices of assignment relating to child, family and spousal support obligations shall constitute a default under this Agreement.

- B. CONSULTANT's failure to cure such default within 90 days of notice by COUNTY shall be grounds for termination of this Agreement.

**14. BENEFITS WAIVER**

If CONSULTANT is unincorporated, CONSULTANT acknowledges and agrees that CONSULTANT is not entitled to receive the following benefits and/or compensation from COUNTY or CITY: medical, dental, vision and retirement benefits, life and disability insurance, sick leave, bereavement leave, jury duty leave, parental leave, or any other similar benefits or compensation otherwise provided to permanent civil service employees pursuant to the County Charter, the County Code, the Civil Service Rule, the Sacramento County Employees' Retirement System and/or any and all memoranda of understanding between COUNTY and its employee organizations. Should CONSULTANT or any employee or agent of CONSULTANT seek to obtain such benefits from COUNTY or CITY, CONSULTANT agrees to indemnify and hold harmless COUNTY and CITY from any and all claims that may be made against COUNTY for such benefits.

**15. CONFLICT OF INTEREST**

CONSULTANT and CONSULTANT's officers and employees shall not have a financial interest, or acquire any financial interest, direct or indirect, in any business, property or source of income which could be financially affected by or otherwise conflict in any manner or degree with the performance of services required under this Agreement.

**16. LOBBYING AND UNION ORGANIZATION ACTIVITIES**

- A. CONSULTANT shall comply with all certification and disclosure requirements prescribed by Section 319, Public Law 101-121 (31 U.S.C. § 1352) and any implementing regulations.
- B. If services under this Agreement are funded with state funds granted to COUNTY or CITY, CONSULTANT shall not utilize any such funds to assist, promote or deter union organization by employees performing work under this Agreement and shall comply with the provisions of Government Code Sections 16645 through 16649, inclusive.

**17. PUBLIC COMMUNICATIONS**

- A. CONSULTANT agrees to acknowledge in all public communications and public outreach related to the program and/or project funded under this Agreement that the program and/or project is supported by Sacramento

Housing and Redevelopment Agency, a Joint Powers Authority of Sacramento County and the City of Sacramento.

- B. CONSULTANT further agrees to promptly inform COUNTY and CITY of any public communications or public outreach activities related to the program and/or project. CONSULTANT shall submit drafts of any press releases or promotional materials for review and approval by COUNTY and CITY prior to dissemination.

**18. NONDISCRIMINATION IN EMPLOYMENT, SERVICES, BENEFITS AND FACILITIES**

- A. CONSULTANT agrees and assures COUNTY and CITY that CONSULTANT and any subconsultants shall comply with all applicable federal, state, and local anti-discrimination laws, regulations, and ordinances and to not unlawfully discriminate, harass, or allow harassment against any employee, applicant for employment, employee or agent of COUNTY or CITY, or recipient of services contemplated to be provided or provided under this Agreement, because of race, ancestry, marital status, color, religious creed, political belief, national origin, ethnic group identification, sex, sexual orientation, gender identity, gender expression, age (over 40), medical condition (including HIV and AIDS), or physical or mental disability. CONSULTANT shall ensure that the evaluation and treatment of its employees and applicants for employment, the treatment of COUNTY and CITY employees and agents, and recipients of services are free from such discrimination and harassment.
- B. CONSULTANT represents that it is in compliance with and agrees that it will continue to comply with the Americans with Disabilities Act of 1990 (42 U.S.C. § 12101 et seq.), the Fair Employment and Housing Act (Government Code § 12900 et seq.), and regulations and guidelines issued pursuant thereto.
- C. CONSULTANT agrees to compile data, maintain records and submit reports to permit effective enforcement of all applicable anti-discrimination laws and this provision.
- D. CONSULTANT shall include this nondiscrimination provision in all subcontracts related to this Agreement.

**19. INDEMNIFICATION**

- A. To the fullest extent permitted by law, for work or services provided under this Agreement, CONSULTANT and COUNTY shall mutually indemnify, defend, and hold harmless the other party, its Board of Supervisors, officers, directors, officials, employees, authorized volunteers, and agents

(collectively "Indemnified Parties") from and against any and all claims, demands, actions, losses, liabilities, damages, and costs incidental thereto (collectively "Claims"), including cost of defense, settlement, arbitration, expert fees, and reasonable attorneys' fees, arising out of or resulting from CONSULTANT's performance of this Agreement, except and in proportion to the extent caused by the negligence of COUNTY, its Board of Supervisors, officers, directors, employees, agents or volunteers.

- B. To the extent permitted by law, this indemnity obligation shall not be limited by the types and amounts of insurance or self-insurance maintained by CONSULTANT, CONSULTANT's subconsultants, or any party used by CONSULTANT in performance of this Agreement.
- C. The provisions of this indemnity obligation shall survive the expiration or termination of the Agreement.

**20. INSURANCE**

Without limiting CONSULTANT's indemnification, CONSULTANT shall maintain in force at all times during the term of this Agreement and any extensions or modifications thereto, insurance as specified in Exhibit B. It is the responsibility of CONSULTANT to notify its insurance advisor or insurance carrier(s) regarding coverage, limits, forms and other insurance requirements specified in Exhibit B. It is understood and agreed that COUNTY shall not pay any sum to CONSULTANT under this Agreement unless and until COUNTY is satisfied that all insurance required by this Agreement is in force at the time services hereunder are rendered. Failure to maintain insurance as required in this Agreement may be grounds for material breach of contract.

**21. COMPENSATION AND PAYMENT OF INVOICES LIMITATIONS**

- A. Compensation under this Agreement shall be limited to the Maximum Total Payment Amount set forth in Exhibit C except in the instance of an approved amendment.
- B. CONSULTANT shall submit an invoice in accordance with the procedures prescribed by COUNTY and CITY on a monthly basis. Invoices shall be submitted to COUNTY no later than the fifteenth (15th) day following the invoice period, and COUNTY shall pay CONSULTANT within thirty (30) days after receipt of an appropriate and correct invoice.
- C. COUNTY and CITY operate on a July through June fiscal year. Invoices for services provided in any fiscal year must be submitted no later than July 31, one month after the end of the fiscal year. Invoices submitted after July 31 for the prior fiscal year shall not be honored by COUNTY and CITY unless CONSULTANT has obtained prior written COUNTY and CITY approval to the contrary.

- D. CONSULTANT shall maintain for four (4) years following termination of this agreement full and complete documentation of all services and expenditures associated with performing the services covered under this Agreement. Expense documentation shall include: time sheets or payroll records for each employee; receipts for supplies; applicable subcontract expenditures; applicable overhead and indirect expenditures.
- E. In the event CONSULTANT fails to comply with any provisions of this Agreement, COUNTY and CITY may withhold payment until such non-compliance has been corrected.

**22. SUBCONTRACTS, ASSIGNMENT**

- A. CONSULTANT shall obtain prior written approval from COUNTY and CITY before subcontracting any of the services delivered under this Agreement. CONSULTANT remains legally responsible for the performance of all contract terms including work performed by third parties under subcontracts. Any subcontracting will be subject to all applicable provisions of this Agreement. CONSULTANT shall be held responsible by COUNTY and CITY for the performance of any subconsultant whether approved by COUNTY and CITY or not.
- B. This Agreement is not assignable by CONSULTANT in whole or in part, without the prior written consent of COUNTY and CITY.
- C. The County Executive Officer and City Manager have the authority to approve assignment of this Agreement under paragraphs (A) and (B), above.

**23. AMENDMENT AND WAIVER**

Except as provided herein, no alteration, amendment, variation, or waiver of the terms of this Agreement shall be valid unless made in writing and signed by both parties. Waiver by either party of any default, breach or condition precedent shall not be construed as a waiver of any other default, breach or condition precedent, or any other right hereunder. No interpretation of any provision of this Agreement shall be binding upon COUNTY unless agreed in writing by the County Executive Officer and the City Manager and their respective Counsels.

**24. SUCCESSORS**

This Agreement shall bind the successors of COUNTY and CONSULTANT in the same manner as if they were expressly named.

**25. TIME**

Time is of the essence of this Agreement.

**26. INTERPRETATION**

This Agreement shall be deemed to have been prepared equally by both of the parties, and the Agreement and its individual provisions shall not be construed or interpreted more favorably for one party on the basis that the other party prepared it.

**27. COUNTY EXECUTIVE OFFICER/CITY MANAGER**

As used in this Agreement, "County Executive Officer" shall mean the County Executive Officer for the County of Sacramento. "City Manager" shall mean the City Manager of the City of Sacramento. The County Executive Officer or their designee shall administer this Agreement on behalf of COUNTY and is authorized, with the concurrence of the City Manager to make administrative amendments to this relating to scope of work or services; pricing; performance standards, milestones, schedules, and timelines; management practices; and similar matters so long as such amendments do not affect the Total Maximum Payment Amount set forth in Exhibit C (including adjustments authorized under this Agreement and Sacramento County Code § 2.61.440). Unless otherwise provided herein or required by applicable law, the County Executive Officer shall be vested with all the rights, powers, and duties of COUNTY herein. With respect to matters subject to approval, satisfaction, or discretion of COUNTY, the County Executive Officer's decision in such matters shall be final.

**28. DISPUTES**

In the event of any dispute arising out of or relating to this Agreement, the parties shall attempt, in good faith, to promptly resolve the dispute mutually between themselves. Pending resolution of any such dispute, CONSULTANT shall continue without delay to carry out all its responsibilities under this Agreement unless the Agreement is otherwise terminated in accordance with the Termination provisions herein. COUNTY shall not be required to make payments for any services that are the subject of this dispute resolution process until such dispute has been mutually resolved by the parties. If the dispute cannot be resolved within fifteen (15) calendar days of initiating such negotiations or such other time period as may be mutually agreed to by the parties in writing, either party may pursue its available legal and equitable remedies, pursuant to the laws of the State of California. Nothing in this Agreement or provision shall constitute a waiver of any of the government claim filing requirements set forth in Title 1, Division 3.6, of the California Government Code or as otherwise set forth in local, state and federal law.

**29. TERMINATION**

- A. COUNTY, with agreement by CITY or Consultant may terminate this Agreement without cause upon thirty (30) days' written notice to the other party. Notice shall be deemed served on the date of mailing. If notice of termination for cause is given by COUNTY and CITY to CONSULTANT and it is later determined that CONSULTANT was not in default or the default was excusable, then the notice of termination shall be deemed to have been given without cause pursuant to this paragraph (A).
- B. COUNTY, with agreement by CITY may terminate this Agreement for cause immediately upon giving written notice to CONSULTANT should CONSULTANT materially fail to perform any of the covenants contained in this Agreement in the time and/or manner specified. In the event of such termination, COUNTY and CITY may proceed with the work in any manner deemed proper by COUNTY and CITY. If notice of termination for cause is given by COUNTY and CITY to CONSULTANT and it is later determined that CONSULTANT was not in default or the default was excusable, then the notice of termination shall be deemed to have been given without cause pursuant to paragraph (A) above.
- C. COUNTY with agreement by CITY, may terminate or amend this Agreement immediately upon giving written notice to CONSULTANT, 1) if advised that funds are not available from external sources for this Agreement or any portion thereof, including if distribution of such funds to the COUNTY is suspended or delayed; 2) if funds for the services and/or programs provided pursuant to this Agreement are not appropriated by the State; 3) if funds in COUNTY's yearly proposed and/or final budget are not appropriated by COUNTY for this Agreement or any portion thereof or 4) if funds that were previously appropriated for this Agreement are reduced, eliminated and/or re-allocated by COUNTY as a result of mid-year budget or revenue reductions during the fiscal year or 5) if CITY fails to authorize SHRA to enter into a Memorandum of Understanding between SHRA and the County to reimburse the County for costs related to the Agreement. .
- D. If this Agreement is terminated under Paragraph A or C above, CONSULTANT shall only be paid for any service completed and provided prior to notice of termination. In the event of termination under paragraph A or C above, CONSULTANT shall be paid an amount which bears the same ratio to the total compensation authorized by the Agreement as the services actually performed bear to the total services of CONSULTANT covered by this Agreement, less payments of compensation previously made. In no event, however, shall COUNTY pay CONSULTANT an amount which exceeds a pro rata portion of the Agreement total based on the portion of the Agreement term that has elapsed on the effective date of the termination.

- E. CONSULTANT shall not incur any expenses under this Agreement after notice of termination and shall cancel any outstanding expense obligations to a third party that CONSULTANT can legally cancel.
- F. The County Executive Officer, jointly with the City Manager, has authority to terminate this Agreement under paragraphs (A), (B) and (C), above.

**30. REPORTS**

CONSULTANT shall, without additional compensation, therefore, make fiscal, program evaluation, progress, and such other reports as may be reasonably required by the County Executive Officer, jointly with the City Manager, concerning CONSULTANT's activities as they affect the contract duties and purposes herein. COUNTY and CITY shall explain procedures for reporting the required information.

**31. AUDITS AND RECORDS**

Upon COUNTY and CITY's request, COUNTY and CITY or its designee shall have the right at reasonable times and intervals to audit, at CONSULTANT's premises, CONSULTANT's financial and program records directly related to the services provided under this contract as COUNTY and CITY deem necessary to determine CONSULTANT's compliance with legal and contractual requirements and the correctness of claims submitted by CONSULTANT. CONSULTANT shall maintain such records for a period of four (4) years following termination of the Agreement and shall make them available for copying upon COUNTY and CITY's request at COUNTY and CITY's expense. COUNTY shall have the right to withhold any payment under this Agreement until CONSULTANT has provided access to CONSULTANT's financial and program records related to this Agreement.

**32. PRIOR AGREEMENTS**

This Agreement constitutes the entire contract between COUNTY and CONSULTANT regarding the subject matter of this Agreement. Any prior agreements, whether oral or written, between COUNTY and CONSULTANT regarding the subject matter of this Agreement are hereby terminated effective immediately upon full execution of this Agreement.

**33. SEVERABILITY**

If any term or condition of this Agreement or the application thereof to any person(s) or circumstance is held invalid or unenforceable, such invalidity or unenforceability shall not affect other terms, conditions, or applications which can

be given effect without the invalid term, condition, or application; to this end the terms and conditions of this Agreement are declared severable.

**34. FORCE MAJEURE**

Neither CONSULTANT nor COUNTY nor CITY shall be liable or responsible for delays or failures in performance resulting from events beyond the reasonable control of such party and without fault or negligence of such party. Such events shall include but not be limited to acts of God, strikes, lockouts, riots, acts of war, epidemics, pandemics, acts of government, fire, power failures, nuclear accidents, earthquakes, unusually severe weather, acts of terrorism, or other disasters, whether or not similar to the foregoing, and acts or omissions or failure to cooperate of the other party or third parties (except as otherwise specifically provided herein).

**35. SURVIVAL OF TERMS**

All services performed and deliverables provided pursuant to this Agreement are subject to all of the terms, conditions, price discounts and rates set forth herein, notwithstanding the expiration of the initial term of this Agreement or any extension thereof. Further, the terms, conditions and warranties contained in this Agreement that by their sense and context are intended to survive the completion of the performance, cancellation or termination of this Agreement shall so survive.

**36. AUTHORITY TO EXECUTE**

Each person executing this Agreement represents and warrants that he or she is duly authorized and has legal authority to execute and deliver this Agreement for or on behalf of the parties to this Agreement. Each party represents and warrants to the other that the execution and delivery of the Agreement and the performance of such party's obligations hereunder have been duly authorized.

**37. DUPLICATE COUNTERPARTS**

This Agreement may be executed in several counterparts, all of which together shall be deemed one and the same agreement. The Agreement shall be deemed executed when it has been signed by both parties.

Electronic and scanned signatures shall be deemed original signatures for all purposes, including proof of terms herein, and shall be binding on each party.

**38. ADDITIONAL PROVISIONS**

The additional provisions contained in Exhibits A, B, and C attached hereto are part of this Agreement and are incorporated herein by reference.

[Contract No. \_\_\_\_\_]

**(SIGNATURE PAGE FOLLOWS)**

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be duly executed as of the day and year first written above.

**COUNTY OF SACRAMENTO**, a political subdivision of the State of California

**CVR Associates, Inc,**

By: \_\_\_\_\_  
David Villanueva  
County Executive Officer  
County of Sacramento

By: \_\_\_\_\_  
Melanie Campbell  
Co-President

“COUNTY”

“CONSULTANT”

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Agreement approved by  
Board of Supervisors

Approved as to Form by the City of  
Sacramento

Agenda Date: \_\_\_\_\_  
Item Number: \_\_\_\_\_  
Resolution Number: 2026-\_\_\_\_\_

By: \_\_\_\_\_  
Maraskeshia S. Smith  
City Manager  
City of Sacramento

“CITY”

Date:

Contract and Consultant Tax Status Reviewed and Approved by County Counsel

By: \_\_\_\_\_  
Lisa A. Travis  
County Counsel

Date: \_\_\_\_\_

**EXHIBIT A to Agreement  
between the COUNTY OF SACRAMENTO  
hereinafter referred to as "COUNTY,"  
and CVR Associates, Inc.  
hereinafter referred to as "CONSULTANT"**

**SCOPE OF SERVICES**

**1. SERVICE LOCATION(S)**

Facility Name(s): CVR Associates, INC.  
Street Address: 4501 N. Point Parkway, Suite 260  
City and Zip Code: Alpharetta, GA 30022

Facility Name(s): Sacramento Housing and Redevelopment Agency  
Street Address: 801 12<sup>th</sup> Street  
City and Zip Code: Sacramento, CA 95814

**2. DESCRIPTION OF SERVICES**

A. The scope of services to be provided by this Agreement are those services identified in COUNTY's Sacramento Housing and Redevelopment Agency 2025-PURB RFP-0061 dated August 28, 2025 and CONSULTANT's Component A - Consultant Services dated November 19, 2025. Both the Sacramento Housing and Redevelopment Agency 2025-PURB RFP-0061 and Component A- Consultant Services are hereby incorporated into this Agreement as Attachment 1, respectively, and made a part of this Agreement. In the event of any inconsistencies or ambiguities, the Component A - Consultant Services shall govern over the Sacramento Housing and Redevelopment Agency 2025-PURB RFP-0061, and this Agreement shall govern over all. CONSULTANT agrees to perform all services stated in this Agreement for the compensation described herein.

B. County Executive Officer, jointly with the City Manager, may negotiate with CONSULTANT and approve reasonable modifications in tasks, work products, schedules, milestones, and staff assignments so long as such modifications are within the general scope of services provided under this Agreement, do not exceed the Maximum Total Payment Amount, and are determined to be in the best interest of COUNTY and CITY.

**3. SCHEDULE**

CONSULTANT shall perform the services in an expeditious manner in accordance with a mutually acceptable schedule developed between COUNTY, CITY, and CONSULTANT.

**4. RESPONSIBILITIES OF COUNTY AND CONSULTANT FOR SCOPE**

- A. COUNTY and CITY, or its authorized representatives, shall review all documents submitted by CONSULTANT and render decisions pertaining thereto as promptly as is reasonable under the circumstances at the time in order to avoid unreasonable delay of the progress of CONSULTANT. COUNTY and CITY shall furnish information and services as required by this Agreement and shall render approvals and decisions as expeditiously as is reasonably necessary under the circumstances at the time for the orderly progress of the CONSULTANT's services and of the project.
- B. CONSULTANT shall be solely responsible for the quality and accuracy of its work and the work of its subconsultants performed in connection with this Agreement. Any review, approval, or concurrence therewith by the COUNTY and CITY shall not be deemed to constitute acceptance or waiver by COUNTY or CITY of any error or omission as to such work. CONSULTANT shall coordinate the activities of any subconsultants and is responsible to ensure that all plans, drawings, and specifications are coordinated and interface with the other applicable plans, drawings, and specifications to produce a unified, workable, and acceptable whole functional product.

**5. AUTHORITY OF CONSULTANT PERFORMING SCOPE OF WORK**

CONSULTANT is retained to provide and perform the scope of services covered by this Agreement. CONSULTANT, including CONSULTANT's assigned personnel, shall have no authority to represent COUNTY, CITY or COUNTY or CITY staff at any meetings of public or private agencies unless an appropriate COUNTY and/or CITY official provides prior written authorization for such representation which outlines the purpose, scope and duration of such representation. CONSULTANT shall possess no authority or right to act on behalf of COUNTY or CITY in any capacity whatsoever as agent, nor to bind COUNTY to any obligations whatsoever. COUNTY and CITY is responsible for making all policy and governmental decisions related to the work covered by this Agreement.

**6. PUBLICATION OF DOCUMENTS AND DATA**

CONSULTANT shall not publish, or disclose to any third party, documents, data, or any confidential information relative to the work of the COUNTY and CITY without the prior written consent of COUNTY and CITY, however, submission or distribution to meet official regulatory requirements, or for other purposes authorized by this Agreement, shall not be construed as publication in derogation of the rights of either the COUNTY, CITY or CONSULTANT.

**7. PROJECT PERSONNEL**

In the performance of the services hereunder, CONSULTANT shall provide the personnel as set forth in Attachment 1 - Component A – Consulting Services. Any change in such personnel or reassignment in their project responsibilities must be agreed to in writing by the County Executive Officer jointly with the City Manager or their designees before any such change may be made. Key contacts for this project shall be as follows:

COUNTY:	NAME: PHONE: E-MAIL:	David Villanueva, County Executive Officer (916) 874-5886 villanuevad@saccounty.gov
CITY:	NAME: PHONE: E-MAIL:	Maraskeshia S. Smith, City Manager (916) 808-5775 mssmith@cityofsacramento.org
CONSULTANT:	NAME: PHONE: E-MAIL:	Melanie Campbell 210-896-7335 melanie@cvrassociates.com

**EXHIBIT B to Agreement**  
**between the COUNTY OF SACRAMENTO**  
**hereinafter referred to as "COUNTY,"**  
**and CVR Associates, Inc.**  
**hereinafter referred to as "CONSULTANT"**

**I. INSURANCE**

Without limiting CONSULTANT's indemnification, CONSULTANT shall procure and maintain for the duration of the Agreement, insurance against claims for injury to persons or damage to property which may arise from or is in connection with the performance of the work hereunder and the results of that work by the CONSULTANT, its employees, agents, representatives, subconsultants, or any other party for which CONSULTANT is legally liable.

**II. MINIMUM SCOPE OF INSURANCE**

Coverage shall be at least as broad as:

1. **Commercial General Liability (CGL):** Insurance Services Office Form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$2,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 05 09 or 25 04 05 09) or the general aggregate limit shall be twice the required occurrence limit.

2. **Automobile Liability:** ISO Form Number CA 00 01 covering any auto (Code 1), or if CONSULTANT has no owned autos, covering hired, (Code 8) and non-owned autos (Code 9), with limit no less than \$1,000,000 per accident for bodily injury and property damage.

Personal Lines automobile insurance shall apply if vehicles are individually owned with limits of no less than \$250,000 per person, \$500,000 each accident, \$100,000 property damage.

3. **Workers' Compensation:** Insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.

4. **Professional Liability (Errors and Omissions):** Insurance appropriate to the CONSULTANT's profession, with limit no less than \$2,000,000 per occurrence or claim and \$4,000,000 aggregate covering CONSULTANT's wrongful acts, errors and omissions. Any aggregate limit for professional

liability must be separate and in addition to any CGL aggregate limit.

**If the CONSULTANT maintains broader coverage and/or higher limits than the minimums shown above, the COUNTY requires and shall be entitled to the broader coverage and/or the higher limits maintained by the CONSULTANT.**

### III. **INSURANCE PROVISIONS**

The insurance policies are to contain, or be endorsed to contain, as applicable, the following provisions:

1. **Additional Insured Status:** The COUNTY, its Board of Supervisors, all COUNTY officers, officials, employees, volunteers, and agents, Sacramento Housing and Redevelopment Agency, Housing Authority of the City of Sacramento, and Housing Authority of the County of Sacramento (“Additional Insureds”) are to be covered as additional insureds on the general and auto liability policies with respect to liability arising out of work or operations performed by or on behalf of the CONSULTANT including materials, parts, equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement on the CONSULTANT’s insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used).
2. **Primary Coverage:** For any claims related to this Agreement, the CONSULTANT’s insurance coverage shall be primary and non-contributory and at least as broad as ISO CG 20 01 04 13 as respects the Additional Insureds. Any insurance or self-insurance maintained by the Additional Insureds shall be excess of the CONSULTANT’s insurance and shall not contribute with it. This also applies to any CONSULTANT Excess or Umbrella liability policies.
3. **Umbrella or Excess Policy:** The CONSULTANT may use Umbrella or Excess Policies to provide the liability limits as required in this agreement. This form of insurance will be acceptable if the Primary and Umbrella or Excess Policies provide all the insurance coverages herein required, including, but not limited to, primary and non-contributory, additional insured, Self-Insured Retentions (SIRs), indemnity, and defense requirements. The Umbrella or Excess policies shall be provided on a true “following form” or broader coverage basis, with coverage at least as broad as provided on the underlying Commercial General Liability insurance. No insurance policies maintained by the Additional Insureds, whether primary or excess, and which also apply to a loss covered hereunder, shall be called upon to contribute to a loss until the

CONSULTANT's primary and excess liability policies are exhausted.

4. **Notice of Cancellation:** Each insurance policy required above shall provide that coverage shall not be canceled without notice to the COUNTY.
5. **Waiver of Subrogation:** CONSULTANT hereby grants to COUNTY a waiver of any right to subrogation which any insurer of CONSULTANT may acquire against the COUNTY by virtue of the payment of any loss under such insurance. CONSULTANT agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the COUNTY has received a waiver of subrogation endorsement from the insurer.
6. **Self-Insured Retentions:** Self-insured retentions ("SIR"s) must be declared to and approved by the COUNTY in writing. The COUNTY may require the CONSULTANT to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the SIR may be satisfied by either the named insured or COUNTY. Any and all deductibles and SIRs shall be the sole responsibility of CONSULTANT or subconsultant who procured such insurance and shall not apply to the Additional Insureds. The COUNTY may deduct from any amounts otherwise due CONSULTANT to fund the SIR/deductible. Policies shall not contain any SIR provision that limits the satisfaction of the SIR to the CONSULTANT. The policy must also provide that defense costs, including the allocated loss adjustment expenses, will satisfy the SIR or deductible. The COUNTY reserves the right to obtain a copy of any policies and endorsements for verification.
7. **Acceptability of Insurers:** Insurance is to be placed with insurers authorized to conduct business in the state with a current A.M. Best's rating of no less than A:VII. Lower rated, or approved but not admitted insurers, or any other requirement changes (such as limits) are subject to the prior approval of the County Risk Manager.
8. **Claims Made Policies:** If any of the required policies provide claims-made coverage (1) the Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work, (2) insurance must be maintained, and evidence of insurance must be provided for at least three (3) years after completion of the contract of work, and (3) if coverage is canceled or non-renewed and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the CONSULTANT must purchase "extended reporting" coverage for a minimum of three (3) years after completion of

work.

- 9. Verification of Coverage:** CONSULTANT shall furnish the COUNTY with original certificates and amendatory endorsements, or copies of the applicable policy language affecting coverage required by this Exhibit. All certificates and endorsements and copies of the Declarations and Endorsements pages are to be received and approved by the COUNTY before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the CONSULTANT's obligation to provide them. The COUNTY reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time. Any failure, actual or alleged, on the part of the COUNTY to monitor or enforce compliance with any of the insurance requirements is not deemed a waiver of any rights on the part of the COUNTY.
- 10. Severability of Interest:** The CONSULTANT 's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
- 11. Subconsultants:** If CONSULTANT uses subconsultants or others to perform work under this Agreement, such subconsultants or other persons shall be Named Insured or Additional Insured to the CONSULTANT's required insurance coverage or required by the CONSULTANT to comply with equivalent insurance and conditions of this section.
- 12. Maintenance Of Insurance Coverage:** CONSULTANT shall provide COUNTY with evidence of each policy's renewal ten (10) days in advance of its anniversary date. CONSULTANT is required by this Agreement to immediately notify COUNTY if they receive a communication from their insurance carrier or agent that any required insurance is to be canceled, non-renewed, reduced in scope or limits or otherwise materially changed. CONSULTANT shall provide evidence that such insurance has been replaced, or its cancellation notice is withdrawn, without any interruption in coverage, scope or limits. No cancellation provisions in the insurance policy shall be construed in derogation of the continuing duty of CONSULTANT to furnish insurance during the term of this Agreement. Failure to maintain required insurance in force shall be considered a material breach of the Agreement.
- 13. Special Risks or Circumstances:** COUNTY reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

**EXHIBIT C to Agreement  
between the COUNTY OF SACRAMENTO  
hereinafter referred to as "COUNTY,"  
and CVR Associates, Inc.  
hereinafter referred to as "CONSULTANT"**

**COMPENSATION**

**1. MAXIMUM PAYMENT TO CONSULTANT**

The Maximum Total Payment Amount under this Agreement is: **\$650,000**

<u>Compensation Summary</u>	
Strategy 1	\$225,000
Strategy 2	\$150,000
Strategy 3	\$125,000
Travel Expenses	\$150,000
<b>Total</b>	<b>\$650,000</b>

**2. COMPENSATION COMPONENTS**

The Compensation for services rendered under this Agreement shall be on a task bases at the usual customary rates for the services rendered and shall not exceed \$650,000.

After 90 days there will be a review period to allow CONSULTANT to report on actual costs which will be based on information obtained during the first 90 days.

Total compensation, including fees, expenses, and profits, for services rendered by CONSULTANT shall not exceed the maximum total above.

**3. AMENDMENT**

This Agreement may be amended to increase the maximum compensation amount; provided, however, that such increase shall not exceed the lesser of ten percent (10%) of the annual payment amount under this Agreement or \$25,000.

**4. ITEMIZED TASKS AND SUBTASKS**

If CONSULTANT's Attachment 1 - Component A – Consultant Services contains a schedule of tasks or subtasks with identified levels of effort such as estimated hours and/or estimated costs, or identifiable work products, milestones, or other events, then compensation for these individual tasks or activities shall not exceed the identified estimate or other limiting factors without the written approval of COUNTY and CITY. CONSULTANT shall promptly notify COUNTY and CITY in writing of any tasks, subtasks, work products, or milestones that need to be

reevaluated and indicate the reason and/or justification for such reevaluation. COUNTY and CITY are authorized to negotiate adjustments of individual tasks so long as the work is within the general scope of the project and the total compensation does not exceed the Maximum Total Payment Amount under this Agreement listed above.

**5. WORK NOT IN SCOPE OF SERVICES**

CONSULTANT shall immediately notify the COUNTY and CITY in writing of any work that the COUNTY and CITY requests to be performed that CONSULTANT believes is outside of the original scope of work covered by this Agreement. If it is determined that said request is outside of the scope of work, such work shall not be performed unless and until the COUNTY AND CITY approves such request in writing and authorizes the use of any contingency funds for such work, or an amendment providing for an adjustment in CONSULTANT's compensation is approved and executed by both parties.

**6. NOTIFICATION OF 75% EXPENDITURE OF COMPENSATION**

CONSULTANT shall notify COUNTY and CITY in writing upon expenditure of seventy-five percent (75%) of the authorized Agreement amount. Such notice shall identify the percentage of funds expended, the percentage of work completed, an explanation of any variation between these two (2) percentages, and an assessment of the cost of the remaining work to be performed.

**7. SUBMISSION OF INVOICES**

CONSULTANT shall address and submit all invoices associated with this Agreement by U.S. mail or personal delivery to the following address:

County of Sacramento  
Attention: David Villanueva  
700 H Street, Suite 7650  
Sacramento, CA 95814

City of Sacramento  
Attention: Maraskeshia S. Smith  
915 I Street, 5<sup>th</sup> Floor  
Sacramento, CA 95814

E-mail: [oceaccountspayable@saccounty.gov](mailto:oceaccountspayable@saccounty.gov)

CONSULTANT shall include the following information on all invoices:

- a. Contract Number \_\_\_\_\_
- b. Project Name \_\_\_\_\_

- c. Date of Invoice Submission
- d. Time Period Invoice Covers
- e. Services Provided and Respective Compensation Requested
- f. Any other information deemed necessary by CONSULTANT and/or COUNTY and CITY.

**8. PAYMENTS**

The COUNTY and CITY shall review work product and invoices. The COUNTY and CITY shall jointly approve and authorize payments. In accordance with the Compensation and Payment of Invoices Limitations provisions of this Agreement, COUNTY shall address and submit payments to CONSULTANT at address in the Notice provision of this Agreement.

CVR Associates, Inc.  
Lockbox #641751  
500 First Avenue  
Pittsburgh, PA 15219

CONSULTANT may change the address to which subsequent payments shall be sent by giving written notice designating a change of address to COUNTY, which shall be effective upon receipt.

**EXHIBIT D  
FEDERAL CONTRACT PROVISIONS  
(U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT (HUD)  
2 CFR PART 200, APPENDIX II)**

These Federal Contract Provisions (this "Exhibit D") are incorporated into and made part of the Agreement by and between the County of Sacramento ("COUNTY") and the Consultant ("CONSULTANT"). This Exhibit D shall apply only to the extent that all or a portion of the Agreement is funded with federal financial assistance, including but not limited to funds provided by the United States Department of Housing and Urban Development ("HUD"). In the event of a conflict between this Exhibit D and any other provision of the Agreement, the federal requirements set forth herein shall govern to the extent required by applicable federal law.

For purposes of this Exhibit D, the term "Contractor" as used in 2 CFR Part 200, Appendix II, shall mean CONSULTANT.

**1. APPLICABILITY OF FEDERAL REQUIREMENTS**

CONSULTANT acknowledges that the Agreement may be funded in whole or in part with federal funds and agrees to comply with all applicable federal statutes, regulations, executive orders, and HUD requirements, including but not limited to 2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards) and HUD program requirements applicable to the funding source.

**2. ADMINISTRATIVE, CONTRACTUAL, AND LEGAL REMEDIES (2 CFR Part 200, Appendix II(a))**

The administrative, contractual, and legal remedies available to COUNTY in the event of CONSULTANT's breach of the Agreement are set forth in the Agreement, including but not limited to provisions governing withholding of payment, indemnification, dispute resolution, and termination. These remedies apply to this Exhibit D as fully as if restated herein.

**3. TERMINATION FOR CAUSE AND FOR CONVENIENCE (2 CFR Part 200, Appendix II(b))**

Termination provisions applicable to federal awards, including termination for cause, termination for convenience, and termination due to the unavailability of federal funds, are set forth in the Agreement. Such provisions are incorporated herein by reference and shall apply to any termination involving federal funds.

**4. EQUAL EMPLOYMENT OPPORTUNITY (2 CFR Part 200, Appendix II(c))**

CONSULTANT shall comply with Executive Order 11246, "Equal Employment Opportunity," as amended; the regulations of the U.S. Department of Labor set forth in 41 CFR Part 60; and all applicable rules, regulations, and orders of the Secretary of Labor. CONSULTANT shall include the equal employment opportunity clause in all

subcontracts and shall furnish all information and reports required by such regulations.

5. DAVIS-BACON ACT (2 CFR Part 200, Appendix II(d))  
If the Agreement involves construction, alteration, or repair of public buildings or public works and is subject to the Davis-Bacon Act (40 U.S.C. §§ 3141–3148), CONSULTANT shall comply with all requirements of the Act, including the payment of prevailing wages as determined by the U.S. Department of Labor, and the regulations set forth in 29 CFR Part 5. Applicable wage determinations shall be incorporated into the Agreement by reference.
6. CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (2 CFR Part 200, Appendix II(e))  
Where applicable, CONSULTANT shall comply with the Contract Work Hours and Safety Standards Act (40 U.S.C. §§ 3701–3708) and the regulations set forth in 29 CFR Part 5, including overtime requirements and recordkeeping obligations.
7. RIGHTS TO INVENTIONS, DATA, AND COPYRIGHTS (2 CFR Part 200, Appendix II(f))  
To the extent required by federal law, HUD regulations, or the terms of the federal award, CONSULTANT agrees that HUD, the federal awarding agency, and the Comptroller General of the United States shall have a nonexclusive, irrevocable, royalty-free license to reproduce, publish, or otherwise use, and to authorize others to use, for federal purposes, any data, reports, documents, or other work products developed under the Agreement.
8. CLEAN AIR ACT AND CLEAN WATER ACT (2 CFR Part 200, Appendix II(g))  
For contracts in excess of \$150,000, CONSULTANT shall comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401 et seq.) and the Federal Water Pollution Control Act, as amended (33 U.S.C. § 1251 et seq.). CONSULTANT shall report any violations to COUNTY and to HUD as required.
9. SUSPENSION AND DEBARMENT (2 CFR Part 200, Appendix II(h))  
CONSULTANT certifies that neither it nor its principals are suspended, debarred, or otherwise excluded from participation in federally assisted programs pursuant to 2 CFR Part 180 and HUD regulations at 2 CFR Part 2424. CONSULTANT shall not enter into any subcontract with a party that is suspended or debarred.
10. BYRD ANTI-LOBBYING AMENDMENT (2 CFR Part 200, Appendix II(i))  
For contracts exceeding \$100,000, CONSULTANT shall comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352) and shall submit any required certifications and disclosures, including Standard Form LLL, as applicable.
11. PROCUREMENT OF RECOVERED MATERIALS (2 CFR Part 200, Appendix II(j))  
CONSULTANT shall comply with Section 6002 of the Solid Waste Disposal Act (42

U.S.C. § 6962) and implementing regulations at 40 CFR Part 247, where applicable, by procuring products containing recovered materials as designated by the U.S. Environmental Protection Agency.

12. DOMESTIC PREFERENCE – BUILD AMERICA, BUY AMERICA ACT (2 CFR Part 200, Appendix II(k))

To the extent the Agreement involves infrastructure, CONSULTANT shall comply with the domestic preference requirements of the Build America, Buy America Act (41 U.S.C. §§ 8301–8305), as implemented by HUD, including the use of iron, steel, manufactured products, and construction materials produced in the United States, unless an approved waiver applies.

13. ACCESS TO RECORDS – COMPTROLLER GENERAL (2 CFR Part 200, Appendix II(l))

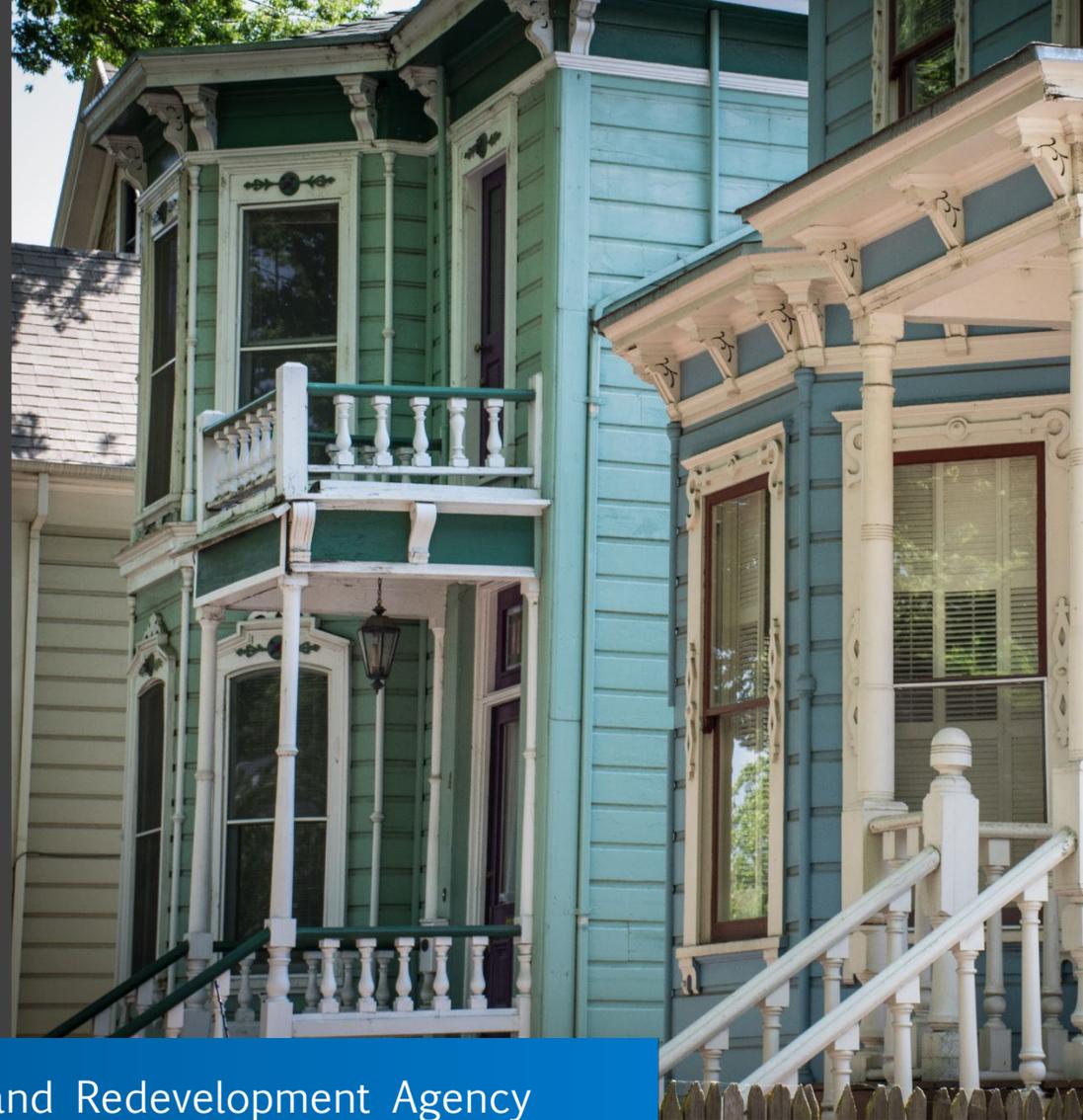
CONSULTANT agrees that COUNTY, SHRA, HUD, the federal awarding agency, the Comptroller General of the United States, and any of their duly authorized representatives shall have access to and the right to examine any books, documents, papers, and records of CONSULTANT that are pertinent to the Agreement for purposes of audit, examination, excerpts, and transcripts.

14. SECTION 3 OF THE HOUSING AND URBAN DEVELOPMENT ACT OF 1968

If applicable, CONSULTANT shall comply with Section 3 of the Housing and Urban Development Act of 1968 (12 U.S.C. § 1701u) and the implementing regulations at 24 CFR Part 75. CONSULTANT shall include Section 3 requirements in all subcontracts and shall make good faith efforts to provide employment, training, and contracting opportunities to Section 3 workers and business concerns.

15. FLOW-DOWN REQUIREMENTS

CONSULTANT shall include all applicable federal requirements set forth in this Exhibit D in every subcontract and shall ensure subcontractor compliance.



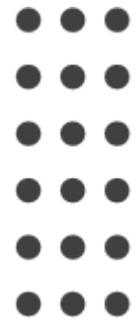
Sacramento Housing and Redevelopment Agency  
2025-PURB RFP-0061

# Component A – Consulting Services

## Proposal

**Submitted by:**

CVR Associates, Inc.  
500 N. Westshore Boulevard, Suite 1010  
Tampa, FL 33609  
(813) 223-3100 Office  
RFP Contact: Kris Warren, [kwarren@cvrassociates.com](mailto:kwarren@cvrassociates.com)



# Table of Contents

<b>EXPERIENCE: FIRM EXPERIENCE AND TEAM QUALIFICATIONS</b> .....	<b>1</b>
<b>Firm Experience</b> .....	<b>1</b>
CVR Associates, Inc.....	1
<b>Team Qualifications</b> .....	<b>2</b>
CVR Associates, Inc.....	3
Atria Planning.....	11
IFH Solutions .....	12
Structure Development Advisors .....	12
Vargas Premier Corporate Consultants, Inc. ....	13
<b>EXPERIENCE: RELEVANCE AND DEPTH OF EXPERIENCE</b> .....	<b>14</b>
<b>CVR Project Experience</b> .....	<b>14</b>
Housing Authority of Baltimore City (HABC) .....	14
King County Housing Authority (KCHA) .....	14
Fort Worth Housing Solutions (FWHS) .....	15
St Petersburg Housing Authority (SPHA).....	15
Other Recent and Relevant HUD Technical Assistance .....	16
<b>Related Subcontractor Project Experience</b> .....	<b>16</b>
Sacramento Housing and Redevelopment Authority.....	16
Metro (Portland-Area regional government and redevelopment body) .....	17
San Francisco Housing Authority (SFHA).....	17
<b>EXPERIENCE: BARRIERS ENCOUNTERED AND LESSONS LEARNED</b> .....	<b>18</b>
<b>DESIGN: PROJECT METHODOLOGY AND EXECUTION</b> .....	<b>19</b>
<b>Project Phases Summary</b> .....	<b>19</b>
Engagement Principles .....	21
Other Best Practices .....	21
<b>DESIGN: REPORTING AND ACCOUNTABILITY</b> .....	<b>22</b>
<b>BUDGET</b> .....	<b>23</b>
<b>REFERENCES</b> .....	<b>25</b>
<b>LETTERS OF SUPPORT</b> .....	<b>26</b>
<b>ATTACHMENTS</b> .....	<b>27</b>



[cvrassociates.com](http://cvrassociates.com)



500 N. Westshore Boulevard, Suite 1010  
Tampa, FL 33609



(813) 223-3100



November 19, 2025

Mr. Matt Levesque, CEO Management Analyst  
Sacramento Housing and Redevelopment Agency (SHRA)  
9660 Ecology Lane  
Sacramento, CA 95827

**RE: Response to Request for Proposals 2025-PURB RFP-0061 – Consultant Services**

Dear Mr. Levesque:

CVR Associates, Inc. (CVR) is pleased to submit the following proposal for Consulting Services to the Sacramento Housing and Redevelopment Agency (SHRA). We are confident that our multi-disciplinary project team, including team members with significant experience in California, has the specialized experience and senior-level commitment to provide the greatest value to SHRA. CVR understands the scope of work and is committed to completing the requested services. CVR further acknowledges that the proposal and completed fee schedule is firm and binding for 180 days.

CVR has provided consulting services to public housing authorities, the U.S. Department of Housing and Urban Development (HUD), and other affordable housing providers for the past 30 years. CVR's high level of expertise has been confirmed by the fact that HUD has repeatedly selected CVR, for over a decade, as one of only a handful of firms to provide technical assistance and training on the Public Housing program, the Housing Choice Voucher program, affordable housing development, mixed-finance, RAD, and related asset repositioning to housing authorities across the country. In addition to nationwide experience, CVR has extensive experience across the State of California, providing consulting services to the Oakland Housing Authority, San Francisco Housing Authority, Housing Authority of the City of Los Angeles, San Diego Housing Commission, Richmond Housing Authority, and Housing Authority of the County of Contra Costa.

As professionals with both public housing and private-sector affordable housing experience, our staff understands the intricacies and obstacles of the various programs that housing authorities utilize and administer, as well as the related regulatory processes and their practical applications in real-world situations. CVR has an established track record of designing and implementing innovative solutions to address the challenges facing affordable housing providers, and with nearly 400 employees located across the country, CVR has the resources to provide effective and responsive service for assignments of virtually any size.

The team comprised for this engagement includes members that have advised senior HUD officials, as well as housing authority and housing provider leadership on agency-wide assessments, program administration, policy implementation, customer service training and plans, governance, resident and stakeholder engagement, and so much more.

Additionally, to provide the best possible resources to SHRA, we have partnered with Atria Planning, IFH Solutions, Vargas Premier Corporate Consultants, Inc. (VPCC), and Structure Development Advisors. These subcontractors have more than 30 years of experience each in the affordable housing industry. Detailed information for each team member can be found within the Key Personnel and Subcontractors Performing Services section of this proposal.

The CVR team, overseen by CVR Senior Vice President Kris Warren and directed by CVR Senior Vice President Tracey Sheffield, will bring a diverse team with unmatched expertise, knowledge and technical resources to this engagement. Should you have any questions regarding our submission, please do not hesitate to contact Kris at 813.842.2805 or [kwarren@cvrassociates.com](mailto:kwarren@cvrassociates.com) or me at 210.896.7335 or [melanie@cvrassociates.com](mailto:melanie@cvrassociates.com).

Thank you for your consideration of this proposal.

Cordially,



Melanie Campbell  
Co-President



30 Years Serving the  
Affordable Housing  
Industry



Multi-Disciplinary Staff



Unmatched Industry  
Resources



HUD Preferred  
TA Provider

## Experience: Firm Experience and Team Qualifications

### Firm Experience

#### CVR Associates, Inc.

CVR Associates, Inc., and its affiliated corporations (CVR) comprise a management consulting firm providing a comprehensive range of services to the affordable housing industry. CVR's primary focus is to assist affordable housing providers to optimize development opportunities and to realize organizational efficiencies through systematic program management and technological enhancements. The CVR team is highly qualified and prepared to bring creative, innovative and practical solutions to any affordable housing program or project.

CVR, a Florida corporation, was founded in 1995 by housing professionals with accomplished backgrounds in providing quality services. Its CEO and associates have decades of affordable housing experience in senior and project management positions. CVR maintains operations across the country, with administrative offices in Tampa, Atlanta, Chicago, New York and San Francisco.

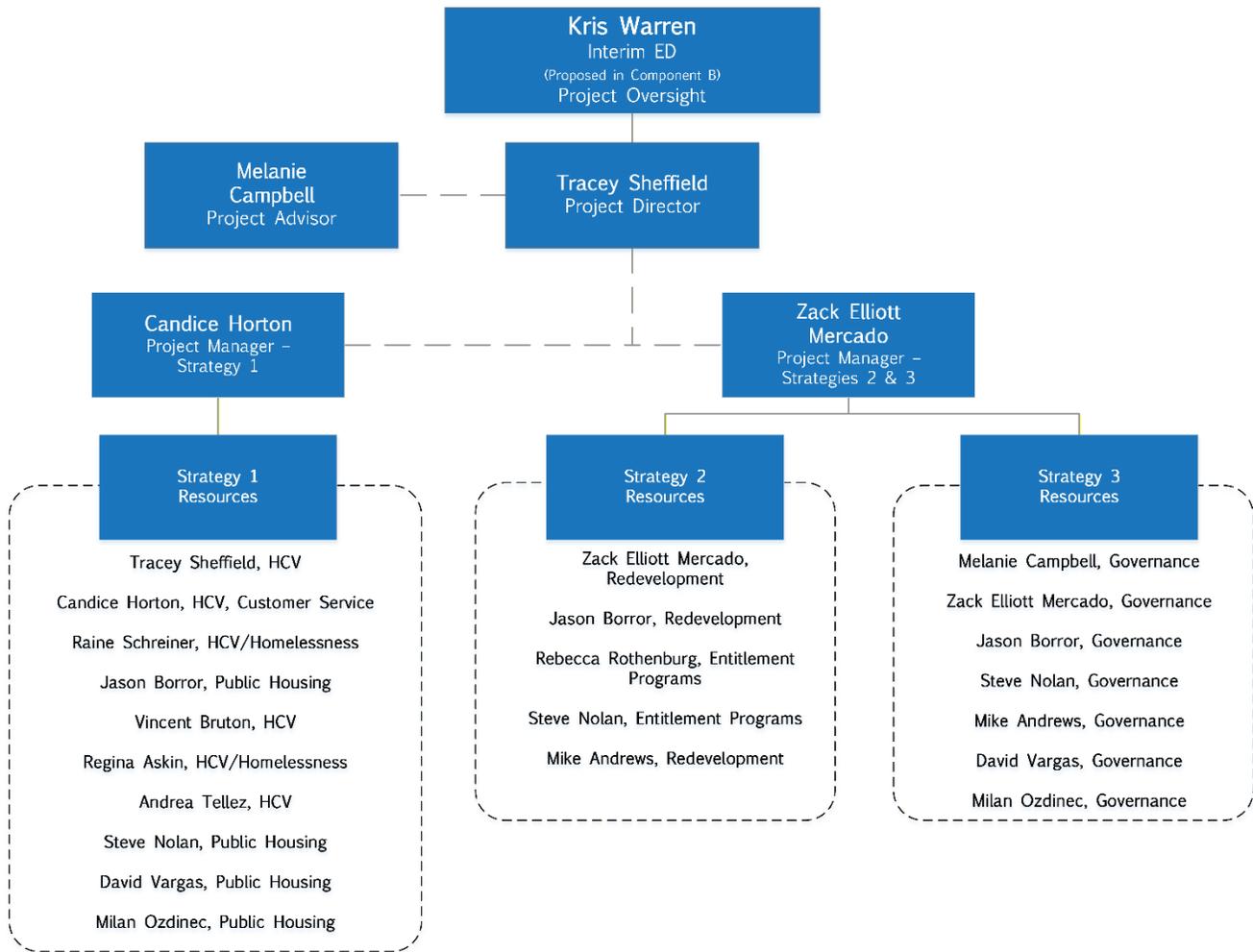
For three decades, CVR has built a strong reputation, providing effective affordable housing consulting, efficient direct management of programs, and practical technology solutions. This is demonstrated by the fact that the U.S. Department of Housing and Urban Development (HUD) has selected CVR to provide technical assistance and training to housing agencies facing management and development challenges. The firm has been instrumental in providing consulting services to help organizations achieve excellence and in turning around struggling public housing agencies. In doing so, CVR is also recognized as an industry leader in the private management of HUD's housing programs, including the Housing Choice Voucher Program.

On the development side, CVR has assisted numerous affordable housing providers in the planning, preparation, and successful implementation of more than \$3 billion of affordable housing repositioning, recapitalization and redevelopment, utilizing RAD, Section 18, Choice Neighborhood (CN), HOPE VI, Low Income Housing Tax Credits and other programs and funding sources to leverage scarce housing authority resources.

CVR staff includes former Executive Directors and Senior-level Staff of PHAs and HUD, Comptrollers, CPAs, Attorneys, Urban Planners, Architects, Engineers, Construction Managers and Information System Specialists. These housing experts, with professional, managerial, programmatic, financial, technological, and legal backgrounds, enable CVR to provide every project and assignment with the appropriate expertise necessary to ensure success.

## Team Qualifications

CVR has provided consulting services to HUD, public housing authorities, and other housing providers for over 30 years. This includes assessments and services in all the program areas and lines of business listed in SHRA’s solicitation. With a uniquely comprehensive scope of service offerings and expertise, nearly 400 employees across the country, and a network of trusted subconsultants, CVR has the resources and ability to provide effective and responsive services to assignments of virtually any scope and size. An organizational chart of the proposed team can be found below.



Bios for CVR and its team of subcontractors can be found on the following pages. In addition, resumes for Project Leads and key team members can be found in **Attachment A**. Supplemental staff can be added if determined necessary and with client approval.

CVR Associates, Inc.

*Melanie  
Campbell*

Co-President

*Project Role:*

- Project Advisor and Governance
- Strategy 3

**Ms. Campbell's** 30-plus years of executive experience in the affordable housing industry has included work related to strategic planning, affordable housing, public housing, housing vouchers, housing development (Rental Assistance Demonstration [RAD], Low Income Housing Tax Credits [LIHTC], Choice Neighborhoods [CN]), fair housing programs, mobility initiatives, stakeholder relations, and HUD program-related rules and regulations. Since joining CVR in 2017, she has participated in assessments, asset repositioning and strategic planning projects for many clients. She also serves as a Choice Neighborhood technical Assistance provider on behalf of HUD. Prior to joining CVR, she served as a Presidential Appointee to HUD's Office of Public and Indian Housing in Washington, DC, where she advised the HUD Secretary and Assistant Secretary on housing programs, operations, governance, development, grant performance, and compliance. She has also served on the executive management team of the San Antonio Housing Authority during which she led the agency's strategic planning activities and its successful CN Planning and Implementation Grant applications. She also participated on the team that produced more than 5,000 new affordable housing units over approximately 7 years. In addition, she brings a uniquely suited combination of professional experiences to each CVR project, which includes decades of successful advisory services related to housing programs, operations, and communications.

***Kris Warren***

Sr. Vice President

***Project Role:***

- Interim Executive Director (Proposed under Component B), Project Oversight

**Ms. Warren's** vast knowledge and wide range of experience comes from over 25 years of affordable housing experience. Since joining CVR, Ms. Warren has assisted HUD and housing authority clients in a variety of areas, including program management, resident relocation, asset repositioning and neighborhood revitalization. Prior to joining CVR, she served as a Professional Staff Member in Washington DC on the U.S. Senate Housing Subcommittee where she assisted and led public housing legislation as it was crafted and enacted. She also served as the Executive Assistant to the Assistant Secretary of Public and Indian Housing at HUD under Secretary Cisneros, where she was the lead in many PHA receiverships and was interim Executive Director in some of these roles. After her position at HUD, she served as the Chief Operating Officer at the Chicago Housing Authority, an MTW Agency, where she assisted in developing and implementing a \$900M+ annual budget and supervised 450+ staff. She also served as Executive Director at the Miami-Dade Housing Authority, and as Deputy Executive Director at the Tampa Housing Authority. Most recently, she has served as the Interim Executive Director at 2 PHAs and assisted the Oakland Housing Authority as the Interim COPFA and COO. *Ms. Warren is being proposed for Component B of this RFP, therefore she has not been included in the budget for Component A.*

*Tracey Sheffield*  
Sr. Vice President

*Project Role:*

- Project Director
- HCV
- Strategy 1

**Ms. Sheffield** has more than 16 years of affordable housing management experience, including management of HCV utilization, reporting and analysis, and technology resources. She has recently led 5 Waiting List openings across the country with the number of accepted applications ranging from 1,300 to 187,000 applications received for each while ensuring HUD compliance. In addition, Ms. Sheffield has led or been a part of several program assessment teams for HUD (to include serving as Project Manager on multiple HUD TA assignments) and multiple housing authorities across the country. She also serves on the team to enhance and implement CVR’s technology tools, including CVR’s Tracker and Applicant Portal. Ms. Sheffield has created a multitude of policy and procedural documents for several agencies, has experience in leading program management transition teams for HCV programs, has conducted and/or prepared HCV trainings for multiple entities, is well-versed in SEMAP preparation and compliance, and has led HCV operations and quality control teams. In addition, she was a part of the project team that created an in-depth PBV manual for a PHA. Ms. Sheffield also directed three Emergency Rental Assistance Programs concurrently across the country during the COVID pandemic. Ms. Sheffield previously served as Utilization and Reporting Supervisor and has extensive experience in leading operational efficiency improvement projects, developing policy and procedures, preparing and presenting procedural training for client employees, and providing program management. Ms. Sheffield holds a Bachelor’s degree in Family and Consumer Sciences with a specialization in Housing and is also NAHRO certified.

***Candice Horton***

Sr. Vice President

***Project Role:***

- Project Manager for Strategy 1
- HCV, Customer Service

**Ms. Horton** is a seasoned executive leader with nearly 25 years of expertise in Housing Choice Voucher (HCV) program management and affordable housing operations. As a Senior Vice President at CVR Associates, she provides strategic leadership in optimizing PHA operations, implementing policy innovations, and enhancing program efficiency. Her extensive knowledge of HUD policies, SEMAP requirements, HCV regulations, and MTW flexibilities, combined with her proficiency in HUD systems and industry technology solutions, enables her to drive performance improvements and compliance across housing programs. At the Chicago Housing Authority, Candice led a team of 100 employees, overseeing the administration of 20,000 Housing Choice Vouchers, services for 15,000 landlords, and the management of \$240 million in Housing Assistance Payments and property owner incentives annually. She provides technical assistance to agencies with diverse and complex demographics, offering expertise in policy development, organizational structure, and operational enhancements. Candice has been instrumental in advancing technology solutions for HCV operations, maximizing the use of Yardi, Elite, and other auxiliary systems to support program administration.

***Zack Elliott Mercado***

Vice President

***Project Role:***

- Project Manager for Strategies 2 and 3
- Redevelopment and Governance

**Mr. Elliott Mercado** has 15 years of affordable housing experience working with HUD and housing authorities of all sizes across the country. He leads many of CVR's development, asset repositioning, strategic planning, resident engagement, and governance engagements. His experience has included providing planning, consulting, technical assistance, resident and community engagement, and project management services to housing authorities, local governments, and other housing providers. His areas of expertise include affordable housing policy, strategic and asset repositioning planning, organizational and operational assessments, governance, public housing asset repositioning programs (Rental Assistance Demonstration [RAD], Choice Neighborhoods [CN], Section 18, etc.), resident engagement, and project-based vouchers. Most notably, Mr. Elliott Mercado has led projects that have resulted in the conversion of over 4,000 public housing units, representing capital investments of over \$500 million. He has also played a critical role in the implementation of CN revitalization initiatives, representing catalytic community investments of over \$600 million. He also serves as a Choice Neighborhood and Asset Repositioning technical assistance provider on behalf of HUD. He holds a Housing Development Finance Professional certification from the National Development Council.

***Raine Schreiner***

Vice President

***Project Role:***

- HCV/Homelessness
- Strategy 1

**Ms. Schreiner** has over two decades of service in a leadership role in the affordable housing and CoC industry. She has overseen the implementation of facilities housing contracts and service coordination for nonprofit programming; and she has built strategic frameworks for rendering services in affordable housing and crisis intervention/ stabilization services for victims of domestic violence, substance abuse, mental health services, veterans, human trafficking, organizational fiscal management, grant management and proposal development operations. Ms. Schreiner has planned and implemented strategies to integrate the gaps in services for the underserved into organizational programs and initiatives, and has provided program oversight that includes HCV, RAD Conversion Relocation, ESG, CoC, RRH, SHP, LIHTC, and Transitional and Emergency Housing programming. She has a strong background in emergency preparedness through planning housing development, programming with in-depth knowledge of Veteran, PHA, Continuum of Care, VAWA, Affordable Housing and Housing Choice Voucher programs in addition to service coordination for mental health programs. Ms. Schreiner has successfully managed a City Emergency Preparedness Plan implemented for cold or inclement weather; has a strong understanding of the National Plan for ending homelessness using the Housing First model; and was awarded the Agency Award from the Homeless Alliance of WNY and nominated for Killian Vetter, and Individual Achievement award for working to eliminate homelessness in WNY area. Ms. Schreiner has demonstrated leadership in managing small and large HCV programs leading to High Performer SEMAP scoring. She has provided HUD TA to multiple PHA's nationally. The TA includes increasing leasing utilization including Special Purpose Vouchers, PIC error corrections, PIC Error Dashboard, eVMS, and waiting list management.

***Jason Borrer***

Senior Associate

***Project Role:***

- Public Housing and Redevelopment
- Strategies 1, 2, and 3

**Mr. Borrer** has two decades of residential construction and affordable housing program experience working for PHAs. He has a strong knowledge of budgeting and grant compliance, having overseen nearly \$200 million in federal grants including Capital Funds, Choice Neighborhoods and numerous emergency grants. He has hands-on knowledge in all areas of PHA operations, with strengths in Public Housing program management, Asset Management, Modernization, Procurement and Asset Repositioning. He has experience working with numerous HUD systems including HEROS (environmental reviews), EPIC (Annual and 5-Yr Capital Plans), PIC (Inventory Removal), Spears (Section 3), the RAD Resource Desk (RRD), among others. Prior to joining CVR, Mr. Borrer served as an interim Director and Director of Development for the Flint Housing Commission (a Choice Neighborhood Implementation Grantee) and prior to this, served as a Capital Asset Manager for the Detroit Housing Commission.

***Vincent Bruton***

Senior Associate

***Project Role:***

- HCV
- Strategy 1

**Mr. Bruton** has a decade of affordable housing experience, primarily within the Housing Choice Voucher Program (HCV), where he has served in a managerial capacity for multiple clients in areas including eligibility, reexaminations, quality control, owner services, training, leasing, etc. He has also served as a consultant/TA provider for several housing authorities in engagements related to HCV operational assessments, the optimization of leasing and utilization, successful implementation of Yardi systems, and Housing Assistance Payment (HAP) auditing.

**Regina Askin**

Senior Associate

**Project Role:**

- HCV/Homelessness
- Strategy 1

**Mrs. Askin** has experience in affordable housing with a focus on Uniform Relocation Act (URA), Section 104(d), Section 18, Rental Assistance Demonstration (RAD) and Choice Neighborhood Initiatives (CNI). Serving as Relocation Associate, she assists with various Public Housing Agencies (PHAs) in several relocation consulting capacities. Currently serving as sole relocation associate in Buffalo, NY, Mrs. Askin is responsible for creating and developing trust between the Relocation Specialist and the residents. Duties include holding project meetings with relocation team and residents. Managing relocation budget guidelines for moving cost. Prior to her work at CVR, Mrs. Askin worked 40 +years as an administrator in human services and residential services. Managing programs funded by Emergency Solutions Grant (ESG) and Department of Housing and Urban Development (HUD). Assisting consumers with applications for Transitional Housing Program (THP) under Low-Income Housing Tax Credits (LIHTC) Identifying participants for Permanent Supportive Housing (PSH) eligible for Housing Choice Voucher Program (HCV). Holding various management roles in behavioral health, homeless community organizations and banking.

**Andrea Tellez**

Senior Associate

**Project Role:**

- HCV
- Strategy 1

**Ms. Tellez** brings more than 16 years of experience in affordable housing operations and program management, with a strong background in Housing Choice Voucher (HCV) administration, compliance, and client services. Her expertise includes policy development, operational assessments, and implementation of HUD program requirements. She has successfully managed initiatives to improve utilization, streamline processes, and enhance service delivery for public housing agencies across diverse markets. Prior to joining CVR, Ms. Tellez held leadership roles overseeing HCV operations, including eligibility, leasing, and quality control functions. She has led teams in implementing technology solutions to optimize program performance and ensure compliance with HUD regulations. Her experience also includes training staff, developing procedural manuals, and supporting agencies through program transitions and audits. Ms. Tellez is committed to advancing operational efficiency and delivering high-quality technical assistance to housing authorities nationwide. Her combination of hands-on program management and strategic planning expertise makes her a valuable resource for clients seeking to strengthen affordable housing programs and improve outcomes for residents.

## Atria Planning

### *Rebecca Rothenberg*

#### Project Role:

- Public Housing, Entitlement Programs
- Strategy 2

**Ms. Rothenberg** is a California-based certified urban planner and experienced consultant specializing in affordable housing, neighborhood development, HUD community development programs, emergency planning and policy design. She has over 20 years of experience and has managed dozens of projects for public housing authorities, State housing agencies, CDBG Entitlement communities, and non-profit developers. This includes managing and authoring Housing Studies for Louisiana and Delaware; managing and authoring Unmet Needs studies for the State of New York and State of New Jersey to support post-Sandy CDBG-DR Action Plans; managing and authoring Strategic Housing Plans for the Louisiana Housing Finance Agency and the New Orleans Housing Authority; developing and managing a CDBG multi-family program for a county government; and providing financial and programmatic assistance for LIHTC Qualified Allocation Plans. Ms. Rothenberg is data-driven and focused on feasibility, specifically finding solutions to housing needs and neighborhood distress through rigorous data analysis, community engagement, and financial feasibility.

In 2019, she served as Housing Lead on behalf of the California Governor's Office of Emergency Services (CalOES) to help rebuild the Town of Paradise after the Camp Fire. In this capacity, she worked closely with CA Housing and Community Development (HCD) and CalOES in developing new programs and strategies using a combination of HUD, FEMA, and state-controlled funds.

In 2018, she assisted the City of Santa Rosa quantify unmet needs after the Tubbs Fire, leading to a revised methodology for how the State of California calculated unmet need. Specifically, she identified an error in the FEMA calculations which considered any insured homeowner to have \$0 in damages and \$0 unmet need. This ultimately led to revisions in how HUD calculated unmet needs in future CDBG-DR allocations.

## IFH Solutions

### *Steve Nolan*

#### Project Role:

- Public Housing, Entitlement Programs and Governance
- Strategies 1, 2, and 3

**Mr. Nolan** has exclusively served the affordable housing industry for more than 20 years, utilizing his expertise in finance, operations, compliance, and training among others. In his capacity as Chief Operating Officer (COO) for IFH Solutions, he has provided services related to financial operations, strategic financial projections, development planning and accounting, MTW Planning and Reporting, Housing Choice Voucher Program operations and Public Housing operations. The firm's clients include public housing agencies (i.e., Chicago Housing Authority, District of Columbia Housing Authority, Seattle Housing Authority, Mobile Housing Authority). Evidence of Mr. Nolan's reputation as an industry expert is the fact that he was selected as part of an elite 26-member team who participated with the negotiated rule-making taskforce of industry representatives and HUD. Mr. Nolan served as Chief Financial Officer (CFO) for the Atlanta Housing (AH) for more than seven years. In this capacity, he managed a \$250 Million annual budget comprised of a variety of funds including those from the Public Housing Program, Capital Fund Program Grants, Replacement Housing Factor Grants, HOPE VI Grants, Housing Choice Voucher Program, ARRA Grants, Tax Credit, PBRA, Homeownership.

## Structure Development Advisors

### *Mike Andrews*

#### Project Role:

- Redevelopment and Governance
- Strategies 2 and 3

**Mr. Andrews** has over 30 years of affordable housing and community development experience, including policy development, program development, underwriting LIHTC equity and debt, technical assistance and training delivery, strategic planning, real estate development, and affordable housing finance. He has deep experience in portfolio repositioning, the development of affordable housing, and finance. He is a nationally recognized leader in RAD and Section 18, and the use of PBVs in repositioning. He also has deep experience in LIHTC, NMTC, HUD multifamily debt, CDBG, HOME, and HTF. He has worked for community development corporations, Enterprise Community Partners and has been the director of development for Home Forward (formerly known as Housing Authority of Portland). Most notably, Structure, under his leadership, has assisted with the conversion and preservation of 1,500 units, representing investments of over \$750M, including development and preservation activities in California. He also has provided services to local governments and jurisdictions on the

administration of housing finance and HUD funding programs, as well as agency governance considerations.

## Vargas Premier Corporate Consultants, Inc.

### *David Vargas*

#### *Project Role:*

- Public Housing and Governance
- Strategies 1 and 3

**Mr. Vargas** is a former Senior Executive Service member at HUD, OPM, and GSA. At HUD, he served as Deputy Assistant Secretary for the Real Estate Assessment Center (REAC), overseeing the assessment of over 33,000 properties and 2.2 million housing units. He also managed IT applications and business intelligence for assisted housing. At OPM, Mr. Vargas held various CIO positions and led initiatives to use IT for human capital support, earning a Fed 100 award for his work on a federal employee digital record prototype. During his 24-year tenure at HUD, he held leadership roles in policy development, strategic planning, budgeting, and financial management. He also managed the Housing Choice Voucher program, public housing, and disaster responses to hurricanes. As Senior Advisor to the Assistant Secretary for Public and Indian Housing, he led the Rental Housing Integrity Improvement Program, receiving the Presidential Rank Award.

### *Milan Ozdinec*

#### *Project Role:*

- Public Housing and Governance
- Strategies 1 and 3

**Mr. Ozdinec** is a former Senior Executive Service member at HUD, having served as the Deputy Assistant Secretary for the Office of Public Housing and Voucher Programs, overseeing the Housing Choice Voucher Program with a budget in excess of \$17 billion in annual HAP payments and serving 2 million low-income Americans. He also held two other critical Deputy Assistant Secretary roles at HUD. He led key initiatives, such as the HOPE VI Program, improving distressed public housing neighborhoods and developing financial and program management systems. He coordinated disaster housing responses for hurricanes Katrina, Rita, Ike, and Gustav with FEMA. Mr. Ozdinec has received numerous awards, including a Presidential Distinguished Executive Award and an Innovations in Government Award for the HOPE VI Program. He was also selected as a Loeb Fellow by Harvard University in 1998. Starting his career with the Bethlehem Housing Authority, he restored 100 distressed rental units under the Section 8 program.

## Experience: Relevance and Depth of Experience

A sampling of relevant experience in evaluating and providing consulting services to similar agencies is included on the following pages.

### CVR Project Experience

#### Housing Authority of Baltimore City (HABC)

Since 2019, CVR has partnered with the Housing Authority of Baltimore City (HABC) to provide consulting services to enhance the operational efficiency and performance of the Housing Choice Voucher (HCV) Program. Through a comprehensive HCV assessment, CVR recommended and implemented strategic improvements that streamlined the leasing process, optimized inspection routing, reduced inspection staff requirements by 40%, and enhanced customer service. Other results included faster call center resolution times and improved office visit protocols. Additionally, CVR's team worked with HABC to transition landlord correspondence and inspection notices to an online portal, which significantly reduced postage costs and improved landlord engagement.

CVR collaborated with HABC to implement operational efficiencies and a strategic staff reorganization that aligned roles with program objectives and boosted overall productivity. Additionally, leadership training provided by CVR focused on effective communication, management styles, and best practices in HCV management, and resulted in strengthened leadership competencies across HABC's HCV management team. To ensure long-term success, CVR continues to provide leadership coaching and is developing comprehensive HCV tracking and reporting systems to enhance program monitoring, staff performance, and compliance. This ongoing partnership underscores CVR's commitment to supporting HABC in delivering high-quality services and maintaining program integrity.

#### King County Housing Authority (KCHA)

In 2020, CVR was selected by the King County Housing Authority (KCHA) to provide a series of assessments related to the agency's operations and programs, including thorough assessments of the Housing Choice Voucher program, the Resident Services program and the Agency's Information Technology services. These assessments culminated in a series of written reports that:

- Documented methodology, existing conditions, and observations.
- Shared the results of industry research and comparative analyses to other comparable agencies.
- Summarized interviews and other outreach methods with staff, partners and stakeholders
- Included a series of observations and provided informed and measurable recommendations related to processes, organizational structure, staffing, investments, efficiencies, best practices, and flexibilities.
- Provided considerations and detailed steps for implementation.

## Fort Worth Housing Solutions (FWHS)

CVR has provided ongoing consulting services to Fort Worth Housing Solutions (FWHS) since 2017. This has included services related to the implementation of a complex Rental Assistance Demonstration (RAD) repositioning strategy, Choice Neighborhood grant writing and program implementation services, strategic planning services, the provision of technology tools, as well as a comprehensive assessment of the agency's Housing Choice Voucher program. This HCV assessment, *completed in 2024*, detailed a series of observations and findings related to:

- Staffing, skillsets, performance measurement, and workloads
- Organizational structure and job descriptions
- Utilization of software, auxiliary programs, and other technology resources and tools
- Processes for efficiently scheduling and managing inspections
- Application of latest HUD flexibilities and policy requirements
- Processes and workflows for day-to-day operations for applications, new admissions, and continued occupancy, quality control, and reporting

To accomplish this scope, the CVR team met with program and agency leadership, shadowed key staff at various levels, reviewed key program reports and data, and reviewed policies and existing standard operating procedures. The CVR team analyzed the information gathered and then applied its program experience and expertise to form recommendations to improve the program's implementation and impact.

## St Petersburg Housing Authority (SPHA)

CVR provided technical assistance on behalf of HUD to the St. Petersburg Housing Authority (SPHA) in 2020. This included a comprehensive operational assessment, a review and update of agency policies and procedures, as well as the development and implementation of a staff training plan. Through this engagement CVR established a baseline of agency conditions through meetings and communications with various levels of agency staff and leadership and reviews of agency documents, data, and internal and third-party reports. The resulting report provided a thorough and comprehensive review of all agency departments and functions, assessing:

- Optimal organizational structures and staffing
- Human resource functions
- Compliance with HUD requirements and utilization of potential regulatory flexibilities in agency policies and procedures
- Utilization of technology
- Training needs
- Resident communication and engagement
- Financial performance
- Planning

The culminating report included detailed action plans to implement each recommendation for each department, agency function, and team addressed within the document.

## Other Recent and Relevant HUD Technical Assistance

CVR Associates, Inc., has been a HUD Technical Assistance provider for over a decade. In this role, CVR and its vast network of highly regarded subconsultants are tasked with solving complex challenges and building the capacity of public housing authorities, HUD, local governments, and other HUD customers. The CVR team has a long and successful record of using our team's experience and expertise to assess existing conditions and provide informed recommendations to improve compliance, program impact, performance, efficiencies, and so much more. Some highlights of a few such engagement include:

- **Housing Authority of the City of Milwaukee, Wisconsin (2021-2023)**- Provided technical assistance and capacity building activities to assess leasing rates within the HCV program and make recommendations to improve leasing, program impact, compliance, and overall performance.
- **Palm Beach County Housing Authority, Florida (2019-2020)**- Provided a comprehensive operational assessment focused on identifying and improving conditions and performance in PBCHA's HCV, LIPH, Finance, Human Resources, IT, and modernization departments.
- **Vallejo County Housing Authority, Shasta County Housing Authority, and El Dorado County Housing Authority, CA (2022)**- Assessed the performance of the HCV program for three California housing authorities and provided recommendations to improve leasing rates, policies and procedures, and to increase utilization of project-based vouchers, as well as increase staff knowledge and performance through targeted trainings. While the scopes for these engagements were concurrent and identical, they were separate engagements with varied observations and recommendations.

## Related Subcontractor Project Experience

### Sacramento Housing and Redevelopment Authority

#### *IFH Solutions*

IFH, led by Steve Nolan, continues to provide ongoing services to SHRA. In 2024, IFH Solutions completed a number of assessments for SHRA, as part of a larger consultant team. These assessments have included:

- **Financial Conditions Assessment:** Analyzed the financial condition of LIPH properties and the impact of repositioning the portfolio on the COCC for both city and county programs, as well as the structure and position of the agency's Finance department and provided detailed recommendations.
- **Organizational Assessment:** Reviewed position content analysis, workload evaluations, and organizational structure of SHRA and provided detailed recommendations.

These assessments utilized data and other information from SHRA, as well as program and industry expertise to develop informed and practical recommendations.

## Metro (Portland-Area regional government and redevelopment body)

### *Structure Development Advisors*

Structure Development Advisors, led by Mike Andrews, provided assessment services to Metro, a regional government structure in the Portland, Oregon metropolitan area. Metro serves 24 cities, including Portland, and has jurisdiction over regional and land use planning, affordable housing financing programs, supportive services, parks, and other public services. In this role, Structure completed an assessment and analysis of an affordable housing bond program, which assessed potential housing unit yield and parameters and organizational considerations for the financing program. This work also included a framework that provided Metro with a process for program implementation.

## San Francisco Housing Authority (SFHA)

### *VPCC*

VPCC provided technical assistance to the San Francisco Housing Authority (SFHA) under a contract with FirstPic, Inc. (May 2024 – December 2024). In this engagement, VPCC conducted various assessments, implemented innovative strategies, and built capacity for the agency's long-term operational success.

VPCC conducted an initial HCV program assessment, followed by a four-phase technical assistance plan. Methods included on-site reviews, structured staff training, contractor oversight evaluations, business process flow documentation, and policy alignment with HUD requirements. The team integrated compliance reviews with practical solutions such as creating SOPs, business process flows, and property profile dashboards. This engagement encompassed oversight of tenant-based and project-based voucher programs, reconciliation of SAC approvals for specific developments, resolution of HUD's Quality Assurance Division findings, and development of long-term asset management strategies for a portfolio of over 7,500 affordable housing units. VPCC coordinated with HUD headquarters, SFHA leadership, City of San Francisco officials, and multiple contractors.

Further VPCC implemented hands-on training for SFHA staff members, introduced innovative compliance approaches, such as piloting tri-annual recertifications for fixed-income families, recommending bi-annual inspection strategies, and creating standardized property profiles for PBV oversight. The team also developed business process flows aligned with ACOP and Admin Plan provisions, giving SFHA a sustainable framework for staff training and program monitoring.

Beyond technical fixes, VPCC played a key role in strengthening SFHA's relationships with the City of San Francisco and HUD by fostering collaboration and transparency. The VPCC team also recommended a realignment of the agency's organizational structure to enhance communication, clarify oversight responsibilities, and build stronger cooperation between the Housing Authority and the City. These efforts positioned SFHA for improved governance, long-term collaboration, and better delivery of affordable housing services.

## Experience: Barriers Encountered and Lessons Learned

This CVR team brings unrivaled expertise in guiding public housing agencies and their governing bodies through financial, operational, and compliance challenges as well as streamlining processes and enacting performance efficiencies to improve operations. CVR has direct experience with both HUD and public housing authorities, granting unique insight into the federal expectations and practical realities for these agencies.

As with all things, though, CVR has encountered some project barriers throughout its more than 30 years of service. Each challenge has presented lessons that will be woven into the approach for this engagement. While the CVR team will do its best to mitigate against foreseeable challenges, there may be unforeseen or avoidable barriers for which this team and SHRA may need to contend. In those cases, this team will remain transparent, nimble, responsive, and determined to meet the agency's needs and the requirements of this scope. Some notable common barriers include:

- **Timelines:** Many engagements start with ambitious timelines and targets set by an agency with good intentions. These can lag, however, if necessary access to staff or information is limited, information is inconsistent or takes time to collect, or if the agency faces understandable distractions that require the focus of key points of contact. This is not uncommon due to the nature of complexity of housing authority and redevelopment authority work. The CVR team will work with SHRA in this engagement to manage schedules and timelines and mitigate against unnecessary delays, but will also come to this engagement with understanding and realistic expectations.
- **Resistance to Change:** Assessments can often reveal outdated, inefficient, ineffective, and noncompliant processes and approaches. These findings and their resulting recommendations can sometimes be uncomfortable, particularly for tenured staff that may be accustomed to performing their work in a specific way. This can be met with resistance from staff and leadership, which can present itself in a lack of cooperation, defensiveness, or noncompliance. CVR has learned that making key staff part of the process and obtaining their “buy-in” from the beginning can lead to a more informed perspective and more cooperation and responsiveness during implementation.
- **Failure to Implement:** Perhaps the greatest barrier or challenge to this type of work is a failure to implement the recommendations of the culminating reports. This is all too common among housing authorities and similar agencies. Change is hard, uncomfortable, and requires deliberate and intentional action. The status quo, by contrast, is familiar and requires little time or effort to maintain. CVR knows that preparing and planning for implementation is just as important as providing recommendations. That's why many of our plans and reports include detailed action steps, milestones, and accountability measures to ensure that staff move forward on accepted recommendations and enact real, sustainable improvements.

## Design: Project Methodology and Execution

The CVR Team has extensive experience in assessing the operations, performance, and programmatic impact of public housing authorities and affordable housing providers, including some of the most respected public housing authorities in the nation. Our services, refined during years of multiple successful engagements, together with our multi-disciplinary team with experience and technical expertise in all aspects of public and affordable housing, will enable CVR to successfully assist SHRA in meeting its assessment and agency goals.

CVR's success in similar engagements is due to adhering to three primary tenets:

- Being attentive to the needs of the client through regular and interactive communication;
- Staffing projects with experienced, highly qualified personnel who offer value-added services; and
- Ensuring that quality products, resources and services are provided throughout the life of an engagement.

CVR's approach will incorporate these tenets throughout its work with SHRA. CVR will perform these services and provide all deliverables guided by the critical path and processes outlined in the following pages. This path blends CVR's proven methodology with our understanding of SHRA's timing expectations as outlined in the solicitation. While this timeline will frame and guide the work, as stated within the barriers section of this response, timelines may shift if access to information, key staff, leadership, or other critical needs lag. This is not uncommon. CVR will do everything within its control to manage schedules and mitigate against unnecessary timeline delays.

The CVR Team can be deployed within 30 business days of contract execution, and the assessment with final reports for each strategy is targeted for completion within 6 months of project commencement.

### Project Phases Summary

The CVR Team is proposing to provide services for all three strategies in Component A. This engagement will be carried out in phases. To expedite the completion of the various strategies and to be efficient with SHRA resources, certain tasks across different strategies will be conducted simultaneously, as outlined in the following table.

Project Timeline & Deliverables	
<p>Phase 1: Project Mobilization and Stakeholder Engagement</p> <p>Weeks 1 -4</p>	<ul style="list-style-type: none"> <li>■ <b>Kickoff Meeting:</b> Initiate the project with SHRA to clarify objectives, confirm deliverables, and establish communication protocols.</li> <li>■ <b>Stakeholder Identification:</b> Develop a staff and stakeholder log including SHRA staff, governing bodies, partners (developers, service providers), and Sacramento residents.</li> <li>■ <b>Engagement Strategy:</b> Schedule interviews and focus groups in coordination with SHRA staff to gather qualitative and quantitative data and feedback from all stakeholder groups.</li> <li>■ <b>Document Request:</b> Request key documents, policies, procedures, reports, program data, and other information critical to the project through an initial document request list for each strategy, which will be managed and maintained by each strategy’s Project Manager and overseen by the Project Director.</li> </ul>
<p>Phase 2: Assessment and Data Collection</p> <p>Weeks 5-8</p>	<ul style="list-style-type: none"> <li>■ <b>Document Review:</b> Review and analyze SHRA policies, procedures, organizational charts, program data, City/County/SHRA strategy documents, and relevant HUD compliance records.</li> <li>■ <b>Process Mapping:</b> Create detailed process maps for client and partner interactions with SHRA systems (e.g., public housing, voucher programs, homeless initiatives, etc.).</li> <li>■ <b>Comparative Analysis:</b> Benchmark SHRA’s processes and policies against peer agencies in counties of similar size and composition.</li> </ul>
<p>Phase 3: Program Evaluation and Analysis</p> <p>Weeks 8-16</p>	<ul style="list-style-type: none"> <li>■ <b>Public Housing &amp; Voucher Programs:</b> Assess operational efficiency, compliance with HUD guidelines, and County/community homelessness initiatives, including integration or lack thereof with current initiatives. For homelessness programs, assess and provide recommendations on SHRA-specific tasks and functions in coordination with the Continuum or Care.</li> <li>■ <b>Finance &amp; Development:</b> Analyze SHRA’s redevelopment agency’s processes, including strengths, gaps, and opportunities for enhanced coordination.</li> <li>■ <b>Oversight &amp; Governance:</b> Review roles and responsibilities of SHRA’s governing bodies, including the Housing Authority Board, Board of Supervisors, and Sacramento Housing and Redevelopment Commission. Evaluate reporting requirements and decision-making structures.</li> </ul>

## Project Timeline & Deliverables

### Phase 4: Recommendations and Reporting Weeks 17-24

- **Draft Report:** Develop individualized comprehensive reports for each strategy with actionable recommendations for program enhancements, process improvements, and governance alignment.
- **Review & Feedback:** Present observations and recommendations to SHRA, City and County; solicit feedback and refine recommendations.
- **Final Report:** Deliver the finalized reports, including implementation guidance, detailed action steps, accountability measures, and a roadmap for continuous improvement.

*A sampling of similar reports can be provided upon request.*

## Engagement Principles

Throughout this engagement and particularly in Phases 1-3, the CVR team will use the following principles developed over decades of resident, partner, and stakeholder engagement when meeting and communicating with agency staff, partners, and stakeholders:

- **Inclusive Participation:** Ensure representation from all relevant groups, including staff, partners, and residents.
- **Transparent Communication:** Maintain regular updates and feedback loops throughout the project lifecycle.
- **Anonymity and Trust:** Use confidential interviews to encourage candid input

All engagement with staff, partners, and stakeholders will be coordinated with SHRA through an agreed upon communications plan, as noted below.

## Other Best Practices

Additionally, CVR will also incorporate the following best practices into the overall project approach.

- **Collaboratively Develop Final Scope, Timeline, and Communications Plan:**
  - Work closely with SHRA, City and County to tailor the scope, timeline, and approach to local needs.
  - Develop a communications plan to govern engagement and routine client touch points for updates on progress, barriers, information needed, etc.
- **Mixed-Methods Data Collection:** Collect information through a variety means and from a variety of sources, including document reviews, interviews, focus groups, data, etc.
- **Process Mapping and Gap Analysis:** Identify inefficiencies, areas of noncompliance and gaps in processes and approaches, and highlight areas of improvements to increase program impact and meet agency goals.

- **Comparative Benchmarking:** Use peer agency comparisons to inform recommendations.
- **Iterative Reporting:** Provide regular updates on progress, initial findings, barriers, and items needed. Provide draft findings for discussion and feedback before finalizing recommendations.
- **Efficiency:** Make the best use of limited agency funds, resources, and time by being efficient with CVR hours and expenses, as well as being strategic about communications, interactions, and requests to agency staff. As indicated in the Project Phase Summary, CVR expects several tasks, meetings, and activities to occur concurrently to be efficient with both time and expenses.

## Design: Reporting and Accountability

As noted in the last section, the CVR team will work collaboratively with SHRA to determine a final scope and timeline at project kick-off that is informed by the solicitation, but further defines updated agency needs, desired timelines and milestones, and goals. These initial meetings will also establish:

- Points of contact for both the general engagement and each strategy
- Regular touchpoints with points of contact through scheduled site visits, recurring virtual meetings, and regular project updates that allow for information sharing, dialogue, and course correction
- Protocols and coordination for stakeholder and partner engagement
- Methods for file sharing and transmission

Once established, these and other key details will be incorporated into a project tracker, communication plans, and other administrative and management tools that the Project Director and Project Managers will use in the implementation of work for each strategy. CVR will also ensure that SHRA is clear on the roles and responsibilities of various team members.

These will aid in ensuring SHRA remains informed and that the various strategy teams remain in alignment with SHRA's desired timeline and goals.

## Budget

CVR proposes a cost of **\$500,000** for this scope of work, inclusive of approximately 2,144 hours of consulting time and estimated travel costs for up to four CVR team members to make two 5-day site visits and three team members to make three 5-day site visits for necessary meetings, information gathering and engagement. Travel has been estimated at approximately \$2,932 per person per trip. A breakdown of costs by strategy, inclusive of estimated travel can be found below and a detailed budget can be found on the following page.

Strategy 1	\$225,000
Strategy 2	\$150,000
Strategy 3	\$125,000

The fees and expenses will be invoiced monthly based on hours worked and the following hourly rates. Travel costs will be billed based on actual expenses, but in alignment with published GSA travel rates, unless otherwise approved by SHRA.

	Title	Hourly Rates
CVR Associates, Inc.	Co-President	275
	Executive Vice President	260
	Senior Vice President	235
	Vice President	210
	Senior Associate	160
	Associate	140
	Jr. Associate	110
	Admin Support	90
Subconsultants	Atria Planning- <i>R. Rothenberg</i>	230
	IFH Solutions- <i>Steve Nolan</i>	200
	Structure Development Advisors- <i>Mike Andrews</i>	260
	VPCC- <i>David Vargas/Milan Ozdinec</i>	290

A more detailed estimated project budget summary can be found below. Please note, the allocation of hours is an estimate and may be adjusted as specific needs are revealed throughout project implementation.

	Hourly Rate	Total Hours	Strategy 1	Strategy 2	Strategy 3
Melanie Campbell, Co-President	275	40	5	5	30
Tracey Sheffield, SVP	235	240	80	80	80
Candice Horton, SVP	235	205	205	0	0
Zack Elliott Mercado, VP	210	230	0	150	80
Raine Shreiner, VP	210	10	10	0	0
Regina Askin, Sr Assoc	160	20	20	0	0
Andrea Tellez, Sr Assoc	160	25	25	0	0
Vincent Bruton, Sr Assoc	160	250	250	0	0
Jason Borrer, Sr Assoc	160	500	200	200	100
Content Development	160	24	8	8	8
Admin	90	30	10	10	10
<b>Subconsultants</b>					
VPCC	290	230	150	0	80
IFH Solutions	200	70	30	20	20
Structure	260	230	0	150	80
Atria	230	40	0	40	0
<b>Totals (Including Estimated Travel)</b>			<b>\$225,000</b>	<b>\$150,000</b>	<b>\$125,000</b>

As former Executive Directors and Senior-level Staff from PHAs and HUD, our Project Managers are always focused on service delivery in the most cost-efficient manner. Some examples include minimizing travel by strategically planning when in-person, on-site meetings are necessary, and utilizing virtual meetings, conference calls, emails and other communications when appropriate. When travel is required, our company-wide policy is to book travel at rates not to exceed General Services Administration (GSA) standard travel rates whenever possible.

## References

Client/Project Information	Contact
<p><b>Agency Name:</b> Housing Authority of Baltimore</p> <p><b>Project Name and Description:</b> Assessment of HCV Program</p> <p><b>Year Completed:</b> 2023</p> <p><b>Project Manager:</b> Candice Horton</p>	<p><b>Name and Title:</b> Corlis Alston, Senior Vice President of HCV</p> <p><b>E:</b> <a href="mailto:Corliss.Alston@habc.org">Corliss.Alston@habc.org</a></p> <p><b>P:</b> (443) 984-2218.</p>
<p><b>Agency Name:</b> West Palm Beach Housing Authority</p> <p><b>Project Name and Description:</b> Assessment of HCV Program</p> <p><b>Year Completed:</b> 2025</p> <p><b>Project Manager:</b> Candice Horton</p>	<p><b>Name and Title:</b> Linda Odum, Executive Director</p> <p><b>E:</b> <a href="mailto:lodum@wpbha.org">lodum@wpbha.org</a></p> <p><b>P:</b> (561) 655-8530.</p>
<p><b>Agency Name:</b> Housing Authority of the City of Milwaukee</p> <p><b>Project Name and Description:</b> Assessment of HCV Program and related policies and procedures. Assignment was through HUD Technical Assistance.</p> <p><b>Year Completed:</b> 2023</p> <p><b>Project Manager:</b> Michael Tonovitz</p>	<p><b>Name and Title:</b> Ken Barbeau, Acting Secretary-Executive Director</p> <p><b>E:</b> <a href="mailto:kbarbe@hacm.org">kbarbe@hacm.org</a></p> <p><b>P:</b> (414) 286-5824</p>

## Letters of Support

Letters of Support from each firm serving as a subconsultant on the CVR team are attached to this proposal as **Attachment B**.

## Attachments

- Attachment A - Resumes
- Attachment B - Letters of Support

## PROFESSIONAL EXPERIENCE

## CVR Associates, Inc.

Jan. 2017 - Present

## Co-President

- Provides consulting services to housing agencies nationwide on matters relating to housing programs (Housing Choice Voucher, Public Housing) and development (Choice Neighborhood Initiative (CNI), Rental Assistance Demonstration (RAD) program), Low Income Housing Tax Credits (LIHTC), redevelopment feasibility, as well as strategic planning, fair housing, mobility initiatives, Moving to Work, and related HUD regulations.
- Successfully served as Project Director for the City of Austin and the Parish of Caddo ERA Programs. Successfully distributed more than \$108M in ERA funds (ERA1, ERA2, Cares Act, CDBG, and General Funds).

## Department of Housing and Urban Development

2015 - 2016

## Special Policy Advisor

- Advised the offices of Public and Indian Housing (PIH) and HUD Secretary on matters relating to public housing, housing vouchers, fair housing initiatives, housing development (LIHTC), Rental Assistance Demonstration (RAD), mobility initiatives, healthy homes (smoke-, lead-free), opportunity initiatives (Choice Neighborhoods, ConnectHome, Jobs- Plus, Family Self-Sufficiency), and related regulations.
- Assessed and problem-solved housing authority matters that had been elevated to Assistant Secretary's office for resolution.
- Represented PIH/HUD in meetings with Congressional offices, as well as state and local elected officials.
- Served as contact for affordable housing groups on policy and regulatory issues.
- Coordinated messaging with HUD's offices of Public Affairs, Public Engagement, and Congressional/ Intergovernmental Relations for accuracy and effectiveness.
- Wrote, edited, and supervised PIH communications for internal and external audiences, including nearly 4,000 public housing authorities, Congressional offices, industry organizations, and advocacy groups.

## San Antonio Housing Authority

2003 - 2015

## Policy, Planning and Public Affairs Officer

2009 - 2015

## Chief of Staff, VP of Corporate Relations, PIO

2003 - 2009

- Advised the President/CEO, executive management team, Board of Commissioners, and internal departments on: housing program operations, communications, community partnerships, strategic planning, community development, and intergovernmental and legislative matters.

- Developed and maintained strong working relationships with stakeholders, including customers, public agencies, elected officials, industry leaders, community partners and local leaders.
- Directed the planning, development, and implementation of external and internal communication activities, programs and initiatives, including publications, newsletters, websites, annual reports, and news releases.
- Provided assessment, guidance, and oversight on local, state and federal affordable housing policies.
- Served on the executive team that produced of more than 5,000 new affordable housing units through HOPE VI, Choice Neighborhoods, LIHTC, etc.
- Supervised staff and managed departments within the agency's \$170M annual budget.
- Led the development of the agency's Strategic Plan, to include the implementation of systems to track and monitor performance metrics.
- Managed the annual Moving to Work planning efforts and submission of HUD reports.
- Oversaw the agency's GIS workgroup, which provided data gathering and support to housing programs, development services, and capital planning teams.
- Served as the agency's spokesperson regarding operations, programs and issues, and responded to media inquiries and requests.
- Led the development of all materials for meetings of the Board of Commissioners and Board Committees, to include meeting logistics.

## Curnutt/Hovis, Inc.

1984 - 2003

### Vice President, Co-owner

- Performed consulting services for clients in the fields of: Housing, Government, Transportation, Healthcare and Manufacturing.
- Managed operations, including budgets, staff, and client services for the public affairs and marketing firm.
- Supervised employees and contractors, conducting a wide range of client account service, including media relations, crisis communications, issues management, special event coordination, materials production and media buying.

## EDUCATION AND PROFESSIONAL CERTIFICATIONS

- Trinity University, San Antonio, TX, Bachelor's Degree in Business Administration and Print Journalism, Magna Cum Laude
- Senior Professional Housing Manager (SPHM) certification 2008
- National Association of Housing and Redevelopment Officials (NAHRO), Masters Leadership Program - Class IV 2007 - 2008
- NAHRO Public Housing Manager (PHM) certification 2006
- NAHRO Section 8 Housing Manager (SHM) certification 2006
- Numerous Awards of Merit And Excellence - NAHRO 2006 - 2013

## PROFESSIONAL EXPERIENCE

CVR Associates, Inc.

Aug. 2016 – Present

Senior Vice President

- Assist HUD and PHA clients in the variety of areas, including:
  - Resident relocation of 332 public housing families on behalf of HUD for the East Chicago Housing Authority.
  - Asset repositioning and revitalization planning on behalf of HUD for the Alexander County (IL) Housing Authority.
  - Rental Assistance Demonstration program implementation and development technical assistance for the Housing Authority of the City of Shreveport.

Boulevard Group

2012 – 2016

Senior Vice President for Consulting Services

- As a Partner, Ms. Warren was tasked with utilizing her expertise to assist PHAs to improve or re-tool their business model as well as to provide technical assistance with their housing operations programs.
- Areas that she assisted with included:
  - Affordable Housing policy
  - HUD regulations
  - MTW innovativeness
  - Strategic Planning
  - Day-to-day PHA functions and organizational activities

Chicago Housing Authority (CHA)

Second-in-command at the 3rd largest housing agency in the country, the Chicago Housing Authority, and central contact for Washington DC relationships.

- Responsible for all aspects of management and oversight at the agency.
- Assisted in developing and implementing a \$900M+ annual budget that did not stray outside budget parameters while supervising and supporting 450+ staff.
- Provided business direction to staff and contractors who manage 50,000+ housing units (18,000 public housing and 38,000 HCV) for 100,000+ individuals.

## Major accomplishments:

- Redefined policies for greater success with long-term strategic plan, including adding resources to adopt affordable housing approaches to increase breadth of portfolio.
- Revised organizational structure that resulted in a decrease in upper management and line staff.
- Realigned budget goals and dollar usage allowing for focus of spending on asset management needs instead of overhead.
- Streamlined property management contracts which resulted in a downsizing from 14 contracts to 5.
- Instituted quality control measures for the 2 largest subsidy programs that led to improved audit results.
- Acted as the key internal contact for HUD and congressional staff on policy and regulatory impact questions as new initiatives were being developed or as operational questions were raised.
- Referred to as the Chicago Housing Authority resource by HUD and other agencies for knowledge, expertise and guidance in the “affordable housing” arena.

## Previous Experience

- Ran the Miami-Dade Housing Agency as the Executive Director.
- Managed the Tampa Housing Authority as the Deputy Executive Director.
- Served as the Executive Assistant to the Assistant Secretary for Public and Indian Housing at the Department of Housing and Urban Development (HUD) — a role that primarily consisted of assessing troubled housing agencies and leading teams for housing authority takeover efforts as well as crafting recovery plans.
- Worked as a professional Staff member for U.S. Senator Alan Cranston on the Banking, Housing and Urban Affairs Subcommittee.

## EDUCATION AND PROFESSIONAL CERTIFICATION

- Bachelor of Arts, 1989, University of the Pacific; Stockton, CA
- Masters’ of Business, 2003, University of South Florida, Tampa, FL

## PROFESSIONAL EXPERIENCE

### CVR Associates, Inc.

2015 - Present

#### Senior Vice President

- Successfully managing the Emergency Rental Assistance Programs for the Puerto Rico Public Housing Administration and Caddo Parrish. Successfully managed the City of Austin's Emergency Rental Assistance Program. Disbursed a combined total of more than \$200M in emergency rent assistance funds (ERA1, ERA2, CARES Act, CDBG, General funds) to eligible families across the country to date.
- Leads seven HUD technical assistance projects to provide support to struggling ERA programs across the country relating to marketing, operations, training, and technology.
- Successfully managed HCV waiting list openings for the City of Los Angeles (HACLA), Gary, Rockland County, Westchester County (PBV), and Buffalo Municipal Housing Authorities using CVR's online Applicant Portal. The HACLA waiting list opening received over 187,000 applications over a two-week period, 82,000 of which were received on the first day with 100% uptime. Coordinated efforts included public notice and advertisements; creating communication materials, banners, signs, FAQs, and flyers in seven languages; configuring the CVR Applicant Portal to each agency's waiting list preferences; training support staff and designated Call Center on Applicant Portal navigation; developing a robust IVR for the call center; partnering with the local library system and more than 75 other social service agencies to assist families with completing applications; generating the lottery selection of 20,000 based on preferences; notifying all applicants of selection and non-selection; working with the agency to import the applicant data in to the agency's system of record; and maintaining a call center for 90 days after the lottery selection.
- Conducted HCV program assessments for the Housing Authority of Bergen County, Municipality of San Juan, Housing Authority of the County of Contra County, and the East Chicago Housing Authority by interviewing HCV staff, forms and letters, and internal processes and procedures; conducting a quality control review of sample files; reviewing the latest SEMAP certification, VMS submissions, and current Administrative Plan; and providing a summarization of areas of improvement, recommended changes to the Administrative Plan, and providing follow up training with materials as needed.
- Monitors overall performance, staffing, compliance with SEMAP and federal regulations, intake and leasing, inspections, utilization, and PIC data for the Montgomery Housing Authority.
- Enhances CVR's proprietary software systems by coordinating with CVR's IT department to create and improve processes and efficiencies relative to HCV applicants, owners, inspections, quality control, and process-tracking systems.

- Served as Interim Manager for CVR's HCV Operation at the Buffalo Municipal Housing Authority and established policies and procedures, participated in hiring decisions and all staff training, and ensured program compliance.
- Served as a part of the Newark Housing Authority transition team by interviewing staff, conducting quality control reviews and analyzing overall operations to determine areas of improvement.

## Housing Authority of DeKalb County

2012 - 2015

### Utilization and Reporting Supervisor

- Managed HAP and voucher utilization for 5,700 vouchers through analyzing the HUD 2-year Forecasting Tool and custom utilization reports in order to make recommendations to the Director.

### Reporting Analyst II

- Conducted and compiled audit data for FY 2014 SEMAP indicators resulting in High Performer status. Reduced PIC monthly error-reporting rate for HCV from 21% to 2% in 4 months by individually cleaning and cross-referencing 5,700 records in Yardi and PIC databases and trained staff to avoid future errors.

### HAP Contracts Team Lead

- Transformed the team with lowest performance to the team with the highest level of productivity and file accuracy within initial 3 months by facilitating an environment consisting of synergy and collaboration. Managed 11 PBV HAP Contracts of over 600 clients by monitoring vacancy and occupancy rates.

### Quality Assurance Analyst

- Increased agency's SEMAP reporting score from Standard to High Performer by applying rules and regulations, statutes that fostered improved program performance.

## Marietta Housing Authority

2010 - 2012

### Yardi Coordinator / Special Programs Housing Advisor

## Georgia Department of Community Affairs

2008 - 2009

### Internship: Disaster Housing Assistance Program (DHAP)

## RELATED TRAINING, EDUCATION AND PRESENTATIONS

- LIHTC Site Compliance Specialist Certification; 98%-Outstanding 2016
- Nan McKay HCV Program Management Certification; 95%-Outstanding 2014
- AMA Management Training 2014
- Nan McKay Developing & Managing PBV Contracts Certification; 91%-Excellent 2014
- Microsoft Excel Advanced, Intermediate, and Basic Training; Certified 2014
- Nan McKay HCV Specialist; Certified 2012
- NAHRO HCV Eligibility, Income, and Rent Calculation; Certified 2009
- NAHRO HCV Occupancy; Certified 2009
- University of Georgia, BS in Family & Consumer Sciences, Emphasis in Housing

## PROFESSIONAL RESUME

### CVR Associates, Inc.

2011 – Present

#### Vice President

- Provides strategic operational and leadership consulting to Public Housing Authorities (PHAs) Housing Choice Voucher (HCV) Programs providing agencies with a roadmap for improvement, efficiency, and innovation.
- Delivers technical assistance, policy guidance, procedural development, and training to PHAs on behalf of the Department of Housing and Urban Development (HUD).
- Collaborates as a member of CVR's HCV Leadership team in the development and implementation of its HCV program administration management strategies.
- Represents CVR Associates and its clients at conferences and tradeshows, as well as facilitate sessions on HCV best practices, HUD policy, and industry innovation.
- Established CVR Content Management team and directs them in the develop of all training materials utilized internally, at PHAs, and as part of HUD deliverables.
- Facilitated the creation of CVR's Learning Management System and leads the development of its eLearning training modules and webinars.
- Advises CVR's clients of opportunities to leverage the utilization technology, aiding them in the assessment of software, potential system upgrades, and the selection product add-ons to create efficiency and promote cost savings.
- Leads CVR's Information Technology, Development, and Data Analysis teams.
- Oversee the development and enhancement of CVR's business solutions, such as CVR's Quality Control Management System, Inspection Management System, workflow tracking solutions, and portals.

#### Director of Owner Services & Administration, Chicago Housing Authority

#### Assistant Director of Tenant and Owner Services

2011 – 2018

- Oversaw the management and administration of over 26,000 HCV Program vouchers in accordance with Chicago Housing Authority (CHA) policies and procedures, HUD regulations, SEMAP, and contractual obligations between CHA and CVR.
- Managed Owner Services, HCV Finance, Data Systems and Analysis for CVR regional administration. As director of Tenant Services, managed Regional Administration, Owner Services, and Program Integrity (Hearings, ICVP, and Abatements).
- Served as a primary risk management coordinator, managing high-priority projects related to HCV business operations, personnel, technology, and policy.
- Developed and employed innovative reporting and quality control systems to ensure the quality and timeliness of staff production, relying on data-driven analysis to improve processes and enhance interdepartmental coordination.
- Led the creation of HCV initiatives such as: Owner, Inspection, & Unit Excellence Program, HCV Owner Portal, and a comprehensive landlord education, outreach, engagement, and marketing approach.
- Contributed to the development of the Owner Symposium, Landlord Resource Council, Owner

and Inspection Guidebooks.

- Collaborated with CHA on Moving To Work initiatives, procedural changes, and HCV administrative plan modifications creating efficiencies and cost saving.
- Supported CHA's HCV and IT teams in implementing and enhancing technology tools and solutions (i.e. iFile, Salesforce, ICVP tracking, Yardi upgrades, and etc.)

## Thomas & Herbert CVP (Quadel subcontractor)

2008 - 2010

### HCV Manager, Chicago Housing Authority

- Managed HCV Team Leaders stationed at CHA's South and West HCV Office.
- Identified program, system, and employee performance deficiencies, and successfully designed training initiatives to address areas of concern to promote staff development and contract compliance.
- Directed the Family Self Sufficiency and Mobility teams.
- Modified West Office process and operational structure, improving office productivity by approximately 40%.
- Oversaw completion of 500+ overdue recertifications in 60 business days while completing the current recertifications at or above 95% compliance and improved West Office Salesforce year-to-date timely closure rating from 88% to 95% in 30 days.
- Led the creation of T&H's Quality Assurance Tracker which guided staff improving quality, monitored accuracy and trends providing real-time management reporting.
- Collaborated with CHA to develop an enhanced administrative plan.

## IL QUADEL (former "CHAC INC")

2001 - 2008

### Team Leader, Chicago Housing Authority

- Managed HCV tenant services teams across regional offices ensuring accurate uniformed processing and customer service levels.
- Maintained positive relations with property owners and elected officials, representing CHA at community events, CAPS summits, as well as other city and ward meetings.
- Coordinated with other departments to meet program goals and respond to customer needs, provided guidance and trained staff on policies and procedures.
- Facilitated participant family obligation and owner workshops.
- Assisted CHA in its transition from ECM to Yardi.

## EDUCATION AND PROFESSIONAL CERTIFICATION

- |   |      |
|---|------|
| ▪ Trinity Christian College, Sociology & Psychology   | 1997 |
| ▪ Housing Choice Voucher Occupancy, Quadel            | 2001 |
| ▪ Housing Quality Standards, Quadel                   | 2005 |
| ▪ Housing Choice Voucher Occupancy, NAHRO             | 2011 |
| ▪ Ethics for Management, NAHRO                        | 2015 |
| ▪ DePaul University, Project Management Certification | 2017 |

## PROFESSIONAL EXPERIENCE

**CVR Associates, Inc.**

**Aug. 2011 - Present**

**Vice President, Multiple Contracts**

**January 2020 - Present**

Provides consulting and project management services to HUD, housing authorities, and other housing providers on matters related to affordable housing development, strategic planning, and asset repositioning, including programs such as the Rental Assistance Demonstration (RAD) program, the Choice Neighborhoods Initiative (CNI), inventory removal programs, the Project-Based Voucher program, various affordable housing funding sources, and related HUD rules and regulations.

### *Asset Repositioning Project Manager and Consultant, Multiple Contracts*

- Leads development and asset repositioning team for multiple PHA clients
- Analyzes PHA and financial data to develop comprehensive and innovative asset repositioning strategies and reports
- Manages RAD conversion activities and developer oversight for multiple PHA clients, including the conversion of over 3,000 units since 2015, representing investments of over \$400M
- Manages Section 18 and Tenant Protection Voucher application and implementation activities for multiple HUD and PHA clients
- Provides services related to Project-Based Voucher awards and processing
- Oversees due diligence, relocation, and construction oversight teams supporting repositioning implementation
- Prepares and/or reviews funding applications including sources such as Low-Income Housing Tax Credits (LIHTC), HOME, CDBG, AHP, etc.
- Oversees and prepares HUD approval packages, such as Development Proposals and Financing Plans
- Advises executive leadership on policy and strategic matters
- Supports resident/community engagement, public relations, and communications with agency Boards, state/local governments, and HUD
- Provides training and procedures on various repositioning and development topics

### *Choice Neighborhood Project Manager and Consultant, Multiple Contracts*

- Manages Choice Neighborhood grant and implementation activities for multiple PHA clients
- Manages initiative planning and Implementation Grant application submission processes for multiple PHA clients since 2016, including 3 successful applicants, representing awards of nearly \$90M and total revitalization investments of over \$550M

- Has led PHA Implementation activities for the Housing Authority of the City of Shreveport since 2018, including oversight of the grantee's Housing Implementation Strategy; community/resident engagement; public relations; branding and marketing; management of grant budgets, timelines, and reporting; oversight of construction monitoring and Section 3 hiring; etc., management of project-based voucher awards; oversight of lease up process; etc.

*Senior Associate, CVR Associates, Inc.*

*July 2017 - January 2020*

*Associate, CVR Associates, Inc.*

*May 2014 - July 2017*

*Program Operations Intern, CVR Associates, Inc.*

*Aug. 2011 - May 2014*

- College internship
- Supported operations for the Chicago Housing Authority's Housing Choice Voucher Program including rental market analysis, file compliance reviews, preparation of training materials and internal policies, and management of special projects

## EDUCATION AND AFFILIATIONS

- B.S. in Public Policy, Economic Development and Urban Planning, Andrew Young School of Policy Studies at Georgia State University, *Summa Cum Laude* 2014
- Housing Development Finance Certification, National Development Council, 2014-2015
- Andrew Young School Academic Excellence in Scholarship Award 2014
- Certificate in ESRI ArcGIS Levels I and II 2014
- Housing Quality Standards Certification, NAHRO 2014

## ATTACHMENT B

---



**ATRIA PLANNING**

Informed planning for better communities

**tel.** (504) 875-6012  
**URL.** [www.atriaplanning.com](http://www.atriaplanning.com)  
**address.** 1223 Cleveland Ave. Suite 200  
San Diego, CA 92103

---

November 12, 2025

Kris Warren, Senior Vice President  
CVR Associates  
500 N Westshore Blvd., Suite 1010  
Tampa, FL 33609

Re: Letter of Support related to services proposed by CVR Associates in response to 2025-PURB RFP-0061

Dear Ms. Warren:

Per the County of Sacramento (County) issued a Request for Proposals on August 28, 2025, seeking services intended to strengthen collaboration between the County, Sacramento Housing and Redevelopment Agency (SHRA) and partners by improving communication and partnership among the stakeholders. Specifically, the County aims to better understand SHRA and the Housing Authority of the County of Sacramento's functions and oversight structure to identify ways to participate more closely and support our objectives

Please accept this letter as a commitment from Atria Planning to collaborate with CVR Associates (CVR) to deliver the elements of the Scope of Work sought by the County. Based on our conversations, Atria and CVR will collaborate on the pros and cons of shifting the management of the County's federal entitlement funding to the County, that would include a comparison of methods other counties of like size and composition as well as the impacts to SHRA, as well as cost savings and efficiencies associated with administration through SHRA. (Strategy 2).

Atria and CVR have worked together on several projects over many years across the country. Our existing working relationship provides a foundation for our firms to successfully collaborate on behalf of the County.

Sincerely,

Rebecca Rothenberg



November 13, 2025

Kris Warren, Senior Vice President  
CVR Associates  
500 N Westshore Blvd., Suite 1010  
Tampa, FL 33609

Re: Letter of Support related to services proposed by CVR Associates in response to  
2025-PURB RFP-0061

Dear Ms. Warren:

The County of Sacramento (County) issued a Request for Proposals on August 28, 2025, seeking services to strengthen collaboration among the County, the Sacramento Housing and Redevelopment Agency (SHRA), and partners by improving communication and stakeholder partnerships. Specifically, the County aims to better understand SHRA and the Housing Authority of the County of Sacramento's functions and oversight structure to identify ways to participate more closely and support our objectives.

Please accept this letter as a commitment from IFH Solutions (IFH) to collaborate with CVR Associates (CVR) to deliver the elements of the Scope of Work sought by the County. Based on our conversations, IFH and CVR will collaborate on the pros and cons of shifting the management of the County's federal entitlement funding to the County, which would include a comparison of methods other counties of like size and composition, as well as the impacts to SHRA, and cost savings and efficiencies associated with administration through SHRA. (Strategy 2), and roles and responsibilities of SHRA's oversight bodies (Strategy 3).

IFH and CVR have worked together on several projects over the years across the country. Our existing working relationship provides a foundation for our firms to collaborate on behalf of the County successfully.

Sincerely,

A handwritten signature in black ink that reads "Stephen Nolan". The signature is written in a cursive style with a large initial "S".

Stephen Nolan, CPA  
Chief Operating Officer

November 12, 2025

Kris Warren, Senior Vice President  
CVR Associates  
500 N Westshore Blvd., Suite 1010  
Tampa, FL 33609

Re: Letter of Support related to services proposed by CVR Associates in response to 2025-PURB RFP-0061

Dear Ms. Warren:

I understand the County of Sacramento (County) issued a Request for Proposals on August 28, 2025, seeking services intended to strengthen collaboration between the County, Sacramento Housing and Redevelopment Agency (SHRA) and partners by improving communication and partnership among the stakeholders. Specifically, the County aims to better understand SHRA and the Housing Authority of the County of Sacramento's functions and oversight structure to identify ways to participate more closely and support our objectives

Please accept this letter as a commitment from Structure Development Advisors (Structure) to collaborate with CVR Associates (CVR) to deliver the elements of the Scope of Work sought by the County. Based on our conversations, Structure and CVR will collaborate on housing finance and community development processes and policies (Strategy 2), and roles and responsibilities of SHRA's oversight bodies (Strategy 3).

Structure and CVR have worked together on several years of projects across the country. Our existing working relationship provides a foundation for our firms to successfully collaborate on behalf of the County.

Very best,

A handwritten signature in blue ink that reads "Michael Andrews".

Michael Andrews  
Principal



VARGAS  
PREMIER  
CORPORATE  
CONSULTANTS

November 13, 2025

Ms. Kris Warren  
Senior Vice President  
CVR Associates  
2309 S. MacDill Avenue, Suite 200  
Tampa, FL 33629

Re: Letter of Support – CVR Associates Response to 2025-PURB RFP-0061

Dear Ms. Warren:

Per the County of Sacramento's Request for Proposals issued on August 28, 2025, seeking services to strengthen collaboration between the County, Sacramento Housing and Redevelopment Agency (SHRA), and community partners by improving communication and alignment across stakeholders, VPCC is pleased to express our full support.

The County's objective is to better understand SHRA and the Housing Authority of the County of Sacramento's functions and oversight structure, and to identify opportunities for deeper partnership in support of shared housing and homelessness-response goals.

Please accept this letter as confirmation that Vargas Premier Corporate Consultants, Inc. (VPCC) is committed to partnering with CVR Associates (CVR) to successfully deliver the Scope of Work outlined in the County's RFP. Based on our discussions, VPCC will collaborate with CVR specifically on:

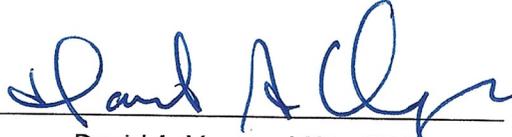
- Evaluating the Housing Authority's Public Housing and Housing Choice Voucher (HCV) programs, identifying opportunities to strengthen performance, compliance, and service delivery within HUD regulations while aligning with County and community housing/homelessness programs; and
- Reviewing and clarifying the roles and responsibilities of SHRA's oversight bodies, supporting the County's efforts to better understand the governance structure and improve interagency coordination.

vpcc

VARGAS  
PREMIER  
CORPORATE  
CONSULTANTS

As VPCC's CEO, I will be directly engaged as part of this project team, and I have had the pleasure of working with CVR's leadership going back 30 years. Our long-standing professional relationship provides a strong, proven foundation for effective collaboration and high-quality service delivery on behalf of the County of Sacramento. We look forward to supporting CVR in this effort and contributing to a successful partnership with the County.

Sincerely,

A handwritten signature in blue ink, appearing to read "David A. Vargas", written over a horizontal line.

David A. Vargas, MSA, CPA  
Chief Executive Officer