Agenda, Minutes, Reports, and Resolutions

Board of Commissioners Regular Meeting

Monday, January 27, 2025, at 6:00 pm

Hope White, Chairwoman

Dr. Michael C. Threatt, Chief Executive Officer

Sanford Housing Authority (SHA)
Board of Commissioners Regular Meeting
AGENDA

Date: January 27, 2025

Time: 6:00 pm

Place: 317 Chatham St. Sanford NC 27330

1. Roll Call/ Call to Order
2. Approval of Agenda: January 2025 Regular Board Meeting
3. Approval of Minutes: December 2024 Regular Board Meeting
4. Old Business
5. New Business
   A. Resolution 2025-01: Resolution to Revise SHA Board Bylaws Regarding Standing Committees
   B. Resolution 2025-02: Resolution to Approve HUD Recovery Agreement Between HUD and SHA
   C. Resolution 2025-03: Resolution to Revise Personnel Manual Regarding Work from Home (WFH) Policy
6. CEO Report
   A. Third-Party Management Company RFP Update
   B. Phone System, Website, and Security Camera System Update
   C. Rental Space Update
   D. Q2 Staff Retreat and Resident Meeting Update
   E. Call Center for Maintenance Afterhours and Weekend
   F. Third-Party NSPIRE Inspection Assessment & REAC/NSPIRE Training
   G. Forensic Audit Proposal- Risk Management Insurance Update
   H. Operational Assessment for Housing Programs
   I. Trust Surveys
7. Department Reports
   A. Public Housing and Maintenance Reports
   B. RAD PBV/ LIHTC and Maintenance Reports
   C. Housing Choice Voucher (HCV) Program Report
   D. Resident Services Report
   E. Development Report
   F. Human Resources Report
   G. Financial Report
8. Commissioners' Comments
9. Public Comments
10. Closed Session (If needed)
11. Adjournment

DECEMBER 16, 2024 REGULAR BOARD MEETING MINUTES

MINUTES
REGULAR MEETING OF THE
BOARD OF COMMISSIONERS OF THE
SANFORD HOUSING AUTHORITY
MONDAY, DECEMBER 16, 2024, AT 6:00 P.M.
317 CHATHAM ST. SANFORD NC 27330

The meeting of the members of the Sanford Housing Authority Board of Commissioners was held at 317 Chatham Street, Sanford, NC 27330, on Monday, December 16, 2024, at 6:00 p.m. in the central office conference room.

The meeting was advertised through the Sanford Housing Authority website; www.sha-nc.org.

Roll Call: The meeting was called to order at 6:00 p.m. p.m. by Chairwoman White on roll call. The following members were present:

Present
Chairperson Hope White
Vice Chairperson William Newby
Commissioner Holly Aeschliman
Commissioner Dianne Sinnamon
Commissioner Jackie Dalrymple
Commissioner Karen Wicker

Absent
Commissioner Erin Britton

Also present: Walter Ferguson, City Commissioner

Public Comments: None

Adoption of the agenda: Ms. Dalrymple made a motion to approve the agenda for the December 16, 2024, board meeting. Ms. Sinnamon seconded the motion. All were in favor, the motion passed unanimously.

Minutes: Ms. Dalrymple made a motion to approve the Regular Board Meeting Minutes for October 28, 2024. Ms. Sinnamon seconded the motion. All were in favor, and the motion passed unanimously.

Old Business: Regular Meeting October 28, 2024
CEO Contract Resolution 2024-17

Ms. Dalrymple motioned to approve the CEO Contract for Dr. Michael C. Threatt. Ms. Sinnamon seconded the motion. All were in favor, and the motion passed unanimously.

New Business:

Personnel Policy Revised Holiday Schedule Resolution 2024-18: Ms. Dalrymple motioned to approve the personnel policy with the revised holiday schedule. Ms. Aeschliman seconded the motion. All were in favor; the motion passed unanimously.

Bylaws Revised (revision to board standing committees): Ms. Aeschliman motioned to approve the addition of the seven board committees to the BOC bylaws. Ms. Dalrymple seconded the motion; all were in favor. The motion passed unanimously.

Closed Session: Mr. Newby made the motion to go into closed session; Ms. Aeschliman seconded the motion. All were in favor; the motion passed unanimously.

In the closed session, the board discussed procuring a forensic audit for the following:
1. To ensure that there were no surprises
2. To clear the way for the new CEO
3. To develop a roadmap for going forward
4. To identify any red flags
5. To evaluate internal controls

The motion to pursue a forensic audit was made by Ms. Dalrymple and seconded by Mr. William Newby.

The board also requested all the payments and outstanding invoices for Eagle Rock/ Mr. Marcus Goodson.

After that, the closed session ended with a motion by Commissioner Jackie Dalrymple, seconded by Commissioner William Newby. The regular board meeting started immediately, leading to the adjournment of the regular board meeting.

Adjournment
Ms. Dalrymple motioned to adjourn the regular meeting for the Board of Commissioners for Sanford Housing Authority. Ms. Sinnamon seconded the motion. All were in favor; the motion passed unanimously. The meeting was adjourned at 8:01 pm.

Minutes prepared by Anesha Pittman

Approved:

_____
Hope W. White, Chairwoman
SHA Board of Commissioners

_____
Secretary, Dr. Michael C. Threatt

RESOLUTION
2025-01

RESOLUTION 2025-01

RESOLUTION TO REVISE SANFORD HOUSING AUTHORITY BOARD OF COMMISSIONERS BYLAWS STANDING COMMITTEES

WHEREAS, the Sanford Housing Authority (SHA) recognizes the need to update its bylaws to better reflect the current needs and strategic direction of the organization; and

WHEREAS, the current bylaws under Section 11 provide for the organization of three standing committees: Policy Committee, Audit/Finance Committee, and Development Committee; and

WHEREAS, the SHA Board of Commissioners has determined that the establishment of additional standing committees will enhance the Board's ability to conduct thorough deliberations on issues and inform and recommend actions to the Commission more effectively; and

WHEREAS, SHA has decided to implement modern-day business practices to improve efficiency and effectiveness; and

WHEREAS, SHA has answered the challenge of evolution through collaborative and transformational leadership, acknowledging the paradigm shift of public housing authorities (PHAs) and striving to stay at the forefront of industry best practices;

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Sanford Housing Authority hereby approves the revision of Section 11 of the SHA Bylaws to read as follows:

Section 11. Standing Committees. The Commission shall organize seven standing committees for the purpose of conducting thorough deliberations on issues and informing and recommending action to the Commission as appropriate. The Chairperson shall assign Commission members to each standing committee. Standing committees of the Commission are the Development Committee, Finance Committee, Housing Committee, Resident Services Committee, Human Resources Committee, Strategic Planning Committee, and Public Relations Committee. As an extension of the Commission as a whole, each committee, with the director's assistance, will determine and establish the responsibilities and duties of the respective committee.

Standing committees shall be comprised of members of the Commission. The chairperson of each standing committee and members of that committee shall be named by the chairperson of the board on an annual basis. The director may appoint housing authority personnel to serve as advisers to the members of the standing committees.

To conduct business, attendance by a minimum of two assigned Commission members is required at each committee meeting. Commission members who are not committee members may share information or answer questions during committee meetings but only after being recognized by the chairperson. However, it is recommended that non-committee Commission members not participate in the process used to formulate final committee recommendations.

The committee chairperson or other Commission member of the committee shall preside at all committee meetings and be responsible for reporting to the Commission on the activities and the consensus of the committee. The committee chairperson shall call meetings and establish an agenda for each committee meeting that shall include any item suggested by the director, committee member or Commission member.

The board chairperson shall be an ex-officio member of each committee. The director shall assist the chairperson of each standing committee in the preparation of the agenda and ensuring that information is available to the committee during deliberation of issues.

A standing committee may only make recommendations to the Commission and has no authority to act on behalf of the Commission. It shall be the practice of committees to develop recommendations through majority consensus of the Commission members on the committee, with input from any personnel assigned to advise the committee.

RECORDING OFFICER'S CERTIFICATION

I, Dr. Michael C. Threatt, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at the regular meeting of the Sanford Housing Authority held on January 27, 2025.

(SEAL)   By:

                                                    _____

                                                    Dr. Michael C. Threatt, Secretary

BOARD RESOLUTION 2025-02

RESOLUTION TO APPROVE RECOVERY AGREEMENT BETWEEN THE U.S. DEPT. OF HOUSING AND URBAN DEVELOPMENT AND THE SANFORD HOUSING AUTHORITY

WHEREAS, the Sanford Housing Authority (SHA) has been designated as "Troubled" status by the U.S. Dept. of Housing and Urban Development's (HUD's) Real Estate Assessment Center (REAC) for the fiscal year ending 2022; and

WHEREAS, the Recovery Agreement (Agreement) to be executed between the Sanford Housing Authority and HUD is a binding contract required by federal statute that delineates performance requirements, reporting requirements, and statutory recovery benchmarks, implemented by regulations found at 24 CFR §902.75(d); and

WHEREAS, one of the terms of the Agreement may require the Sanford Housing Authority to engage residents and other community stakeholders to develop a Sustainability Plan that identifies place-based solutions, steps, and resources to support the agency's recovery; and

WHEREAS, in accordance with state law, the Mayor of the City of Sanford serves as the appointing authority for the Board of Commissioners and has been notified of the requirement for Sanford Housing Authority to execute this Agreement with HUD; and

WHEREAS, SHA is committed to recovering and achieving sustainable performance; and

WHEREAS, SHA aims to meet performance requirements, streamline day-to-day operations through technology, implement best practices for asset management and fiduciary controls, and work towards improving its overall PHAS score while also making informed decisions about the future developments of its public housing stock, including Stewart Manor Senior Development;

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Sanford Housing Authority hereby approves the execution of the Recovery Agreement with HUD, which includes the following performance requirements:

1. **Progress Reports:**

- Submit Progress Reports to HUD starting 30 days after execution of the Agreement, and every month thereafter until the Agreement is terminated.

- Each report must describe the status of SHA's activities to allow HUD to monitor progress.

2. **Performance Improvement:**

- Improve performance by at least 50% of the difference between the initial PHAS assessment score that led to the Troubled designation and the score needed to remove the Troubled designation by the first released PHAS assessment for fiscal years ending on or after 09/30/2024.

- Achieve an overall PHAS score of at least 60% of the total points available by the next sequential fiscal year PHAS assessment.

3. **Increase Occupancy:**

- For fiscal year ending 09/30/2025, increase the occupancy rate for the low rent public housing program to at least 95%.

4. **Improve Physical Condition of Dwelling Units:**

- For developments scoring less than 60% on their physical inspection reports:

  - Procure a physical needs assessment (PNA) from a qualified third-party vendor within 120 days of receiving the score.

  - Work with the PNA vendor to prioritize capital projects in the Capital Fund 5-Year Action Plan.

- For the first released PHAS assessment for fiscal year ending on or after 09/30/2025:

  - Increase the physical sub-indicator (PASS) score to 24 out of 40 possible points, or 60%.

  - If a failing PASS score is received, consult with HUD on project delivery method, third-party vendor, and contract award to improve scores to at least 60% for each property.

5. **Improve Financial Performance:**

- Submit audited financial statements for the fiscal year ending 9/30/2023 within three months following the execution date of this Agreement.

- Submit unaudited financial statements for the fiscal year ending 9/30/2024 and audited financial statements by the deadline of 6/30/2025.

- For the first released PHAS assessment for fiscal years ending on or after 9/30/2025, increase the Financial sub-indicator (FASS) score to at least 15 out of 25 possible points, or 60%.

RECORDING OFFICER'S CERTIFICATION

I, Dr. Michael C. Threatt, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at the regular meeting of the Sanford Housing Authority held on January 27, 2025.

(SEAL)   By:

_____

Dr. Michael C. Threatt, Secretary

RESOLUTION
2025-02

BOARD RESOLUTION 2025-02

RESOLUTION TO APPROVE RECOVERY AGREEMENT BETWEEN THE U.S. DEPT. OF HOUSING AND URBAN DEVELOPMENT AND THE SANFORD HOUSING AUTHORITY

WHEREAS, the Sanford Housing Authority (SHA) has been designated as "Troubled" status by the U.S. Dept. of Housing and Urban Development's (HUD's) Real Estate Assessment Center (REAC) for the fiscal year ending 2022; and

WHEREAS, the Recovery Agreement (Agreement) to be executed between the Sanford Housing Authority and HUD is a binding contract required by federal statute that delineates performance requirements, reporting requirements, and statutory recovery benchmarks, implemented by regulations found at 24 CFR §902.75(d); and

WHEREAS, one of the terms of the Agreement may require the Sanford Housing Authority to engage residents and other community stakeholders to develop a Sustainability Plan that identifies place-based solutions, steps, and resources to support the agency's recovery; and

WHEREAS, in accordance with state law, the Mayor of the City of Sanford serves as the appointing authority for the Board of Commissioners and has been notified of the requirement for Sanford Housing Authority to execute this Agreement with HUD; and

WHEREAS, SHA is committed to recovering and achieving sustainable performance; and

WHEREAS, SHA aims to meet performance requirements, streamline day-to-day operations through technology, implement best practices for asset management and fiduciary controls, and work towards improving its overall PHAS score while also making informed decisions about the future developments of its public housing stock, including Stewart Manor Senior Development;

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Sanford Housing Authority hereby approves the execution of the Recovery Agreement with HUD, which includes the following performance requirements:

1. **Progress Reports:**

- Submit Progress Reports to HUD starting 30 days after execution of the Agreement, and every month thereafter until the Agreement is terminated.

- Each report must describe the status of SHA's activities to allow HUD to monitor progress.

2. **Performance Improvement:**

- Improve performance by at least 50% of the difference between the initial PHAS assessment score that led to the Troubled designation and the score needed to remove the Troubled designation by the first released PHAS assessment for fiscal years ending on or after 09/30/2024.

- Achieve an overall PHAS score of at least 60% of the total points available by the next sequential fiscal year PHAS assessment.

3. **Increase Occupancy:**

- For fiscal year ending 09/30/2025, increase the occupancy rate for the low rent public housing program to at least 95%.

4. **Improve Physical Condition of Dwelling Units:**

- For developments scoring less than 60% on their physical inspection reports:

   - Procure a physical needs assessment (PNA) from a qualified third-party vendor within 120 days of receiving the score.

   - Work with the PNA vendor to prioritize capital projects in the Capital Fund 5-Year Action Plan.

- For the first released PHAS assessment for fiscal year ending on or after 09/30/2025:

   - Increase the physical sub-indicator (PASS) score to 24 out of 40 possible points, or 60%.

   - If a failing PASS score is received, consult with HUD on project delivery method, third-party vendor, and contract award to improve scores to at least 60% for each property.

5. **Improve Financial Performance:**

- Submit audited financial statements for the fiscal year ending 9/30/2023 within three months following the execution date of this Agreement.

- Submit unaudited financial statements for the fiscal year ending 9/30/2024 and audited financial statements by the deadline of 6/30/2025.

- For the first released PHAS assessment for fiscal years ending on or after 9/30/2025, increase the Financial sub-indicator (FASS) score to at least 15 out of 25 possible points, or 60%.

RECORDING OFFICER'S CERTIFICATION

I, Dr. Michael C. Threatt, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at the regular meeting of the Sanford Housing Authority held on January 27, 2025.

(SEAL)   By:

_____

Dr. Michael C. Threatt, Secretary

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Greensboro Field Office
Office of Public Housing
1500 Pinecroft Road, Suite 401, Asheville Building
Greensboro, North Carolina 27407-3838
336-547-4000
www.hud.gov ● espanol.hud.gov

January 15, 2025

Board of Commissioners
c/o Hope White, Chair
Sanford Housing Authority
602 Old Mill Road
Sanford, NC 27330

Re: Recovery Agreement

Dear Commissioners:

The purpose of this letter is to transmit the draft Recovery Agreement (Agreement) to be executed between the Sanford Housing Authority and HUD. This is due to a designation of "Troubled" status by HUD's Real Estate Assessment Center ("REAC") for the fiscal year ending 2022. Thank you for your cooperation in negotiating the terms of the Agreement.

The Agreement is a binding contract required by federal statute that delineates performance requirements, reporting requirements, and statutory recovery benchmarks, implemented by regulations found at 24 CFR §902.75(d). One of the terms of the Agreement may require the Sanford Housing Authority to engage residents and other community stakeholders to develop a Sustainability Plan that identifies place-based solutions, steps, and resources to support the agency's recovery. You will be contacted by a HUD team member to assist you in initiating the process to develop a Sustainability Plan.

The Agreement must be executed 15 days following issuance of this draft, unless further extended by HUD. Failure to execute this Agreement with HUD may be a basis for a determination of substantial default by HUD under section 6(j)(3)(A) of the Housing Act of 1937 as amended and implemented by regulations found at 24 CFR 907.3(b)(1).

In accordance with state law, the Mayor of the City of Sanford serves as the appointing authority for the Board of Commissioners. The mayor has been notified of the requirement for Sanford Housing Authority to execute this Agreement with HUD.

We look forward to working with the Sanford Housing Authority to recover and achieve sustainable performance. If you have any questions about the Agreement, please contact me at Shelia.M.Hester@HUD.gov or 336-851-8072. Thank you for your ongoing assistance in this matter.

Sincerely,

SHELIA HESTER

Digitally signed by
SHELIA HESTER
Date: 2025.01.15
16:58:19 -05'00'

Shelia M. Hester
Director, Office of Public Housing
Office of Field Operations
U. S. Department of Housing and Urban Development

Enclosure

cc:
Willam Newby, Commissioner
Wnewby12@yahoo.com
P.O. Box 1865
Sanford, NC 27331

Carolyn Gilchrist, Commissioner
Gilchrist0514@gmail.com
603 N. Steele Street
Sanford, NC 27330

Dr. Karen Wicker, Commissioner
Mrswicker2000@yahoo.com
1302 Spring Ln.
Sanford, NC 27330

Holly Aeschliman, Commissioner
hollyaeschliman@gmail.com
1105 Wilkins Drive
Sanford, NC 27330

Erin Britton, Commissioner
eacampion@gmail.com
1501 Cranberry Lane
Sanford, NC 27330

Dr. Michael C. Threatt, Executive Director
Sanford Housing Authority
mthreatt@sha-nc.org

Recovery Agreement between the Sanford Housing Authority
And
the United States Department of Housing and Urban Development

This Recovery Agreement ("Agreement") is entered into between the Sanford Housing Authority("SHA") and the United States Department of Housing and Urban Development ("HUD") as of this _____

RECITALS

WHEREAS, under the United States Housing Act of 1937 ("Act"), as amended, 42 U.S.C. § 1437 *et seq.*, HUD is responsible for administering low-income housing programs, and pursuant to the Act, HUD has entered into an Annual Contributions Contract ("ACC") with SHA to develop and operate public housing projects of SHA; and

WHEREAS, pursuant to the Act, HUD must evaluate public housing performance and has instituted the Public Housing Assessment System ("PHAS"); and

WHEREAS, SHA received a failing PHAS score of 46 for the fiscal year ending 09/30/2022 (the "2022 PHAS Assessment"); and

WHEREAS, based on its 2022 PHAS Assessment, SHA has been designated "Troubled" pursuant to section 6(j)(2) of the Act, 42 U.S.C. § 1437d, and 24 C.F.R. part 902, for financial, physical and/or management indicators, or other such deficiencies as HUD has identified; and

WHEREAS, the 2022 PHAS Assessment reflects a failing financial sub-indicator (FASS) of 9 points out of 25; and

WHEREAS, the 2022 PHAS Assessment reflects that low occupancy rates at all SHA properties warrant significant improvements: NC035000003 Harris CT/Crestview (77%), NC035000002 Stewart Manor (75%%), and NC035000001 Linden HGTS/Utley Plaza/Foushee HGTS (92%); and

WHEREAS, the 2022 PHAS Assessment reflects a high tenant accounts receivable ("TAR") resulting in a score of 2 out of 5 at NC035000001 Linden HGTS/Utley Plaza/Foushee HGTS; and

WHEREAS, the 2022 PHAS Assessment reflects a failing physical sub-indicator, based on a score of 49 points out of 100 at NC035000001 Linden HGTS/Utley Plaza/Foushee HGTS; and

WHEREAS, the Act requires HUD and each Troubled Public Housing Agency ("PHA") to enter into a recovery agreement that establishes: performance targets; strategies for meeting targets; and incentives or sanctions for effective implementation of such strategies intended to improve the Troubled PHA's performance such that the agency is no longer designated Troubled; and

WHEREAS, the parties desire to correct all HUD-identified deficiencies through the implementation of this Agreement.

NOW THEREFORE, in consideration for the obligations contained herein, HUD and SHA agree as follows:

General

1. SHA agrees to strictly comply with all terms of this Agreement, including all performance requirements, outcomes, and deadlines in paragraphs 5 through 7 below ("Performance Requirements").

2. HUD, in its discretion, may provide technical assistance to SHA, including training or contract support, to facilitate accomplishment of the Performance Requirements. However, SHA's compliance with this Agreement shall not be contingent on HUD's provision of any technical assistance or other discretionary assistance.

3. SHA must submit Progress Reports to HUD commencing 30 days after execution of the Agreement, and every month thereafter until this Agreement is terminated. Each Progress Report, including any supporting documentation, must describe the status of SHA's activities such that HUD can adequately monitor SHA's progress toward the Performance Requirements.

4. Notwithstanding any Performance Requirements, consistent with section 6(j)(3)(B)(ii) of the Act and 24 C.F.R. 902.75(d), and subject to the waivers and alternate requirements under PIH Notice 2021-14 (HA) 11(a) and 12(d), SHA must:

   a. Improve its performance by at least 50% of the difference between the initial PHAS assessment score that led to the Troubled designation and the score necessary to remove the PHA's Troubled designation by the first released PHAS assessment for fiscal years ending on or after 09/30/2024; and

   b. Improve its performance and achieve an overall PHAS score of at least 60% of the total points available by the next sequential fiscal year PHAS assessment.

   Consistent with paragraph 9 below, failure by SHA to comply with the PHAS assessment improvement requirement in this paragraph 4 shall be a basis for HUD to find SHA in substantial default under section 6(j)(3)(A) of the Act.

Performance Requirements

5. **Increase Occupancy.** SHA agrees to:

   a. For fiscal year ending 09/30/2025, increase its occupancy rate for the low rent public housing program to at least 95%, calculated by dividing Unit Months Leased (Financial Data Schedule (FDS) line item 11210) by Unit Months Available (FDS line item 11190) for the fiscal year ending 09/30/2025, approved unaudited and approved audited FDS submission.

6. **Improve Physical Condition of Dwelling Units.** SHA agrees to:

a. For any developments scoring less than 60% on their individual physical inspection reports on the first released PHAS assessment for fiscal years ending on or after 09/30/2024, SHA shall:

    i. Procure a physical needs assessment ("PNA") from a qualified third-party vendor within (120) days of receiving the score; and

    ii. SHA shall work with the PNA vendor to prioritize the identified capital projects, based on available funding from the HUD Capital Fund Program, in the Capital Fund 5-Year Action Plan; and

b. For the first released PHAS assessment for fiscal year ending on or after 09/30/2025, SHA shall:

    i. Increase the physical sub-indicator ("PASS") on the PHAS assessment of 24 out of 40 possible points, or 60%; or

    ii. Within 12 months of receipt of a failing PASS score on the PHAS assessment, consult with HUD on project delivery method, third party vendor, and contract award on all developments not achieving a score of at least 60 out of 100 possible points, or 60%, on their individual physical inspection reports. For the next sequential fiscal year's assessment, the SHA will increase the physical scores to at least 60% for each of the properties under the contract.

7. **Improve Financial Performance. SHA** agrees to:

a. Submit audited financial statements for the fiscal year ending 9/30/2023 within three months following the execution date of this Agreement; and

b. Submit unaudited financial statements for the fiscal year ending 9/30/2024 and audited financial statements by the deadline of 6/30/2025; and

c. For the first released PHAS assessment for fiscal years ending on or after 9/30/2025, SHA shall increase the Financial sub-indicator ("FASS") on the PHAS assessment to at least 15 out of 25 possible points, or 60%.

8. This Agreement begins on the Effective Date and will continue until the later of: (A) SHA fulfilling all Performance Requirements; or (B) SHA improving its performance pursuant to paragraph 4 of this Agreement.

Default and Remedies

9. Failure of SHA to strictly comply with the terms of this Agreement, including failure to meet any discrete Performance Requirements, shall constitute a default under this Agreement and shall be a basis for a determination of substantial default by HUD under section 6(j)(3)(A) of the Act.

10. In making a determination of substantial default, HUD will do so in compliance with the procedures in 24 C.F.R. 907.5. The notice of substantial default pursuant to 24 C.F.R. 907.5(a) shall constitute the notice of default under this Agreement.

11. If SHA is determined to be in substantial default after breaching this Agreement, HUD may seek any available remedy, including any one or several of the following actions consistent with the Act and its implementing regulations:

   a. Solicit competitive proposals from other PHAs and private housing management agents to manage all or part of SHA's public housing program and project(s).

   b. Petition for the appointment of a judicial receiver for SHA.

   c. Solicit competitive proposals from other PHAs and private entities with experience in construction management to oversee implementation of SHA's public housing Capital Fund.

   d. Take possession of all or part of SHA, including all or part of its public housing program and project(s).

   e. Require SHA to make any other arrangements acceptable to HUD, in its full discretion, for managing all or part of the public housing program and project(s).

12. Notwithstanding anything in this Agreement, HUD retains its full discretion to exercise any rights available under applicable law, including those in section 6(j) of the Act, to make a determination of substantial default or take any available remedial action against SHA, regardless of SHA's compliance with the terms of this Agreement.

13. HUD's exercise or non-exercise of any available rights or remedies under this Agreement or any applicable law will not be construed as a waiver of HUD's right to exercise that or any right or remedy at any time.

14. This Agreement does not in any way contemplate money damages for breach of this Agreement by HUD.

Modifications, Amendments, and Changed Circumstances

15. This Agreement contains the complete and final expression of the recovery agreement between the parties and supersedes any other oral or written proposals, negotiations, conversations, discussions, or agreements between the parties related to the recovery agreement.

16. This Agreement does not supersede, modify, or amend the ACC between HUD and SHA, or in any way excuse SHA from complying fully with its obligations under the ACC. Nothing contained in this Agreement shall serve to limit, modify, or preclude HUD's right to take any remedial action under the ACC.

17. This Agreement may only be modified or amended by a written instrument signed by all of the parties expressly stating that such instrument is intended to modify or amend this Agreement. Any modification or amendment shall be limited to the provisions of this Agreement specifically referred to therein and shall not be deemed a modification or amendment of any other provision.

18. Modification or amendment of this Agreement shall not constitute a waiver of the applicable statutory or regulatory requirements.

19. Should any provision of this Agreement be determined to be invalid or unenforceable by any statute, regulation, or judicial ruling, such determination shall not affect any other provision of this Agreement to the extent that the Agreement shall remain operable, enforceable and in full force and effect to the extent permitted by law. Accordingly, each obligation imposed by this agreement should be construed as severable from the others to the extent it is practicable.

20. The parties shall not be responsible for any failure to implement the terms of this Agreement due to unforeseen and unavoidable circumstances outside of their control, provided that the failure to perform is excused by HUD in writing.

21. To the extent authorized by the Act and HUD regulations, and notwithstanding any other provision of this Agreement, HUD has the total discretion to unilaterally amend this Agreement to address changed factual circumstances affecting the PHA's implementation of this Agreement and, more generally, its programs.

Conflicts

22. In the event of any conflict between the provisions of this Agreement and public housing requirements, including but not limited to the Act, applicable regulations, and the ACC, as those requirements may be amended from time to time, the public housing requirements shall prevail. HUD reserves the right to determine and resolve any such conflict.

No Third-Party Beneficiaries

23. This Agreement confers no rights or remedies upon any person or entity other than HUD or SHA.

Miscellaneous

24. No provision, term, or language contained in this Agreement shall be construed by any Court against HUD for having drafted the agreement. Further, this Agreement shall be read consistently with all applicable federal statutes, regulations, the ACC, or interpretive rule. If the agreement may not be read consistently with a statute, regulation, ACC, or interpretive rule; then the statute, regulation, ACC, or interpretive rule shall control. This Agreement places the exclusive authority with HUD to determine and reconcile any conflict.

25. Any citation of law in this Agreement includes the application of any succeeding law, regulation, ACC, or interpretive rule such as a PIH notice.

26. The parties agree that any cost related to their compliance with this Agreement shall be their individual responsibilities.

27. This Agreement may be executed and delivered in separate counterparts, which, when so executed and delivered, shall be deemed an original.

28. This Agreement may be executed electronically, and electronic signatures must be treated in all respects as having the same force and effect as handwritten or original signatures.

29. HUD and SHA (their employees, subcontractors, partners or assigns) shall comply with all applicable federal, state, and local laws and regulations, as amended from time to time during the term of this Agreement, in the execution of this Agreement.

IN WITNESS WHEREOF, the parties or their duly authorized representatives hereby execute this Agreement on the date first written above.
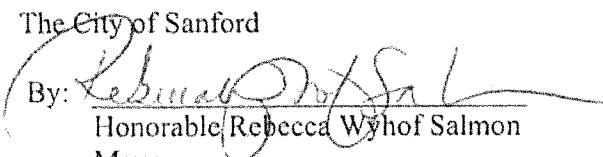
Signature Page Follows

UNITED STATES DEPARTMENT OF HOUSING
AND URBAN DEVELOPMENT

By: _____

Shelia M. Hester
Public Housing Director
Greensboro Field Office

Sanford Housing Authority

By: _____

Hope White
Board Chair
Sanford Housing Authority

By: _____

Dr. Michael C. Threatt
Executive Director
Sanford Housing Authority

The City of Sanford hereby acknowledges that it has reviewed the terms of this Agreement between HUD and SHA:

The City of Sanford

By: _____

Honorable Rebecca Wyhof Salmon
Mayor

Sanford Housing Authority

6-Month Recovery Plan of Action

1. **Operational Efficiency Assessment for Housing**

   - **Assess Operations**: Thoroughly evaluate SHA's workflows, environment, and performance within the agency.
   - **Evaluate Centralized Data Management**: Assess the current data management systems to ensure data is centralized, accessible, and secure.
   - **Advanced Automations**: Identify opportunities to implement advanced automation technologies to streamline processes and reduce manual effort.
   - **Standardized Operational Workflows**: Develop and implement standardized workflows to ensure consistency and efficiency across all operations.

2. **Revise Preventive Maintenance Plan**

   - **Evaluate Current Plan**: Assess the existing preventive maintenance plan to identify gaps and areas for improvement.
   - **Incorporate REAC Reports**: Use previous REAC inspection reports to prioritize maintenance tasks, focusing on health and safety deficiencies
   - **Schedule Regular Inspections**: Ensure annual inspections are conducted and work orders are completed timely
   - **Staff Training**: Train maintenance staff on best practices and efficient deployment

3. **Revise Admissions & Continued Occupancy Plan (ACOP)**

   - **Update Policies**: Revise tenant screening, lease enforcement, and rent collection policies to increase tenant rental revenue
   - **Tenant Education**: Implement programs to educate tenants on lease enforcement and being good renters
   - **Streamline Processes**: Improve waiting list management, tenant selection, and certification processes to reduce vacancy times

4. **Financial Management**

   - **Budget Development**: Adopt best practices for budget development and presentation
   - **Audits:** Prepare for agency audits by ensuring transparency and accuracy in financial reporting.
   - **Forensic Audit:** Conduct a thorough a forensic review with third-party auditors.
   - **Revenue Enhancement**: Consider raising minimum rents and obtaining approval from HUD to reposition non-performing properties
   - **Expense Reduction**: Evaluate current contracts and prioritize spending on essential capital funding needs

5. **Capital Fund Program and Agency Planning**

   - **Align Planning Processes**: Recognize the connections between the Capital Fund Program and the agency planning process
   - **Capital Fund Goals:** Ensure capital funds are used appropriately and not for non-capital purposes

- **Conduct Needs Assessment**: Perform a physical needs assessment (PNA) to identify and prioritize capital funding requirements

6. **Employee Access to HUD Systems**

   - **System Access**: Ensure appropriate employee access to key HUD systems by registering the organization through HUD's Active Partners Performance System (APPS) and designating coordinators
   - **Training**: Provide training for staff on using HUD systems effectively

7. **Operational Plans and Policies**

   - **Evaluate Impact**: Recognize key agency operational plans (annual, five-year, and strategic), and policies and their impacts on programs
   - **Policies & SOPs**: Ensure policies and standard operating procedures (SOPs)are aligned with organizational goals and compliance requirements.
   - **Continuous Improvement**: Regularly review and update operational plans to address changing needs and regulatory requirements

8. **Human Resources Functions**

   - **Talent Management**: Focus on attracting and retaining top talent to improve organizational performance.
   - **Workplace Culture**: Build a positive workplace culture to enhance employee satisfaction and productivity
   - **Training and Development**: Invest in employee training and development to boost skills and performance

9. **Management and Occupancy**

   - **Occupancy Levels**: Maintain acceptable occupancy levels by improving tenant intake and reducing move-outs
   - **Vacancy Turnaround**: Reduce the turnaround time for vacant units by streamlining maintenance and leasing processes
   - **Repositioning Strategy**: Consider repositioning under-occupied developments to the Section 8 platform for better management

Goals of SHA's Six-Month Recovery Plan

By adhering to this comprehensive six-month plan, SHA is committed to addressing performance requirements, enhancing technology utilization, and implementing best practices for asset management and fiduciary controls. This strategic approach will improve SHA's overall PHAS score and enable informed decision-making regarding the future development of its public housing stock, including Stewart Manor Senior Development. We are confident that these actions will lead to significant improvements and ensure our housing initiatives' long-term sustainability and success.

Month 1 (February)
1. **Progress Reports:**
   - **Action:** Submit the first Progress Report to HUD, detailing the current status of activities and initial steps taken.
   - **Documentation:** Include supporting documentation to describe the status of SHA's activities.
2. **Occupancy Rate:**
   - **Action:** Review and update tenant intake and selection processes to reduce vacancy times.
   - **Goal:** Increase occupancy rate by initiating outreach programs to attract new tenants.
3. **Physical Condition:**
   - **Action:** Begin procurement process for a Physical Needs Assessment (PNA) from a qualified third-party vendor.
   - **Goal:** Identify and prioritize critical repairs and maintenance needs.
   - **Action:** Schedule REAC/NSPIRE Pre-Inspection with Third-Party Vendor and REAC/NSPIRE Field Training.
   - **Goal:** Equip staff with the knowledge and skills needed for REAC/NSPIRE compliance.
4. **Financial Performance:**
   - **Action:** Submit audited financial statements for the fiscal year ending 9/30/2023.
   - **Goal:** Ensure financial transparency and compliance.
5. **Technology Improvements:**
   - **Action:** Assess current housing management software and identify areas for improvement
   - **Goal:** Select and begin implementation of a new housing management system to streamline operations
6. **Cloud-Based Document Management:**
   - **Action:** Research and select a cloud-based document management software.
   - **Goal:** Improve document storage, retrieval, and security.

Month 2 (March)
1. **Progress Reports:**
   - **Action:** Submit the second Progress Report to HUD, including updates on occupancy and physical condition improvements.
2. **Occupancy Rate:**

- **Action**: Implement tenant education programs on lease enforcement and good renter practices.
- **Goal**: Reduce move-outs and improve tenant retention.

3. **Physical Condition**:
   - **Action**: Work with the PNA vendor to prioritize capital projects based on available funding.
   - **Goal**: Develop a detailed Capital Fund 5-Year Action Plan.
4. **Financial Performance**:
   - **Action**: Review and update budget development practices to align with best practices.
   - **Goal**: Prepare for upcoming audits and financial assessments.
5. **Technology Improvements**:
   - **Action**: Purchase and implement procurement software to streamline purchasing and vendor management
   - **Goal**: Improve efficiency and transparency in procurement processes.
6. **Rebranding**:
   - **Action**: Develop a rebranding strategy, including a new logo, color scheme, and messaging
   - **Goal**: Enhance the agency's public image and build trust with the community.

Month 3 (April)
1. **Progress Reports**:
   - **Action**: Submit the third Progress Report to HUD, highlighting progress in occupancy and physical condition improvements.
2. **Occupancy Rate**:
   - **Action**: Evaluate and improve rent collection policies to increase revenue.
   - **Goal**: Achieve a higher occupancy rate by reducing rent delinquencies.
3. **Physical Condition**:
   - **Action**: Begin addressing critical and severe deficiencies identified in the PNA.
   - **Goal**: Improve the physical condition of dwelling units.
4. **Financial Performance**:
   - **Action**: Submit unaudited financial statements for the fiscal year ending 9/30/2024.
   - **Goal**: Maintain financial compliance and transparency.
5. **Technology Improvements**:
   - **Action**: Implement workflow automation tools to streamline day-to-day operations
   - **Goal**: Enhance operational efficiency and reduce administrative burden.
6. **Rebranding**:
   - **Action**: Launch the new brand identity internally and prepare for public launch
   - **Goal**: Ensure staff are familiar with the new brand and its messaging.

Month 4 (May)
1. **Progress Reports**:
   - **Action**: Submit the fourth Progress Report to HUD, detailing ongoing improvements and challenges.

2. **Occupancy Rate**:
   - **Action**: Continue tenant outreach and marketing efforts to maintain high occupancy rates.
   - **Goal**: Sustain occupancy rate improvements.
3. **Physical Condition**:
   - **Action**: Monitor and document the progress of ongoing repairs and maintenance.
   - **Goal**: Ensure timely completion of prioritized projects.
4. **Financial Performance**:
   - **Action**: Conduct internal financial audits to identify and address any discrepancies.
   - **Goal**: Strengthen financial management practices.
5. **Technology Improvements**:
   - **Action**: Train staff on new housing management, procurement, and document management software
   - **Goal**: Ensure effective use of new technology to improve operations.
6. **Website Launch**:
   - **Action**: Develop and design a new, mobile-friendly website with integrated tenant account management and payment processing
   - **Goal**: Provide a seamless user experience for the community.

Month 5 (June)
1. **Progress Reports**:
   - **Action**: Submit the fifth Progress Report to HUD, including updates on financial performance and physical condition.
2. **Occupancy Rate**:
   - **Action**: Assess the impact of tenant education programs and make necessary adjustments.
   - **Goal**: Further reduce move-outs and improve tenant satisfaction.
3. **Physical Condition**:
   - **Action**: Continue addressing deficiencies and monitor the impact on the PHAS physical sub-indicator.
   - **Goal**: Achieve a PASS score of at least 24 out of 40 points.
4. **Financial Performance**:
   - **Action**: Prepare for the submission of audited financial statements by the deadline of 6/30/2025.
   - **Goal**: Ensure all financial documentation is accurate and complete.
5. **Technology Improvements**:
   - **Action**: Evaluate the effectiveness of new technology implementations and make necessary adjustments
   - **Goal**: Optimize technology use to further streamline operations.
6. **Website Launch**:
   - **Action**: Launch the new website and promote it through various channels
   - **Goal**: Increase community engagement and improve access to information and services.

Month 6 (July)

1. **Progress Reports**:
   - **Action**: Submit the sixth Progress Report to HUD, summarizing the progress made over the past six months.
2. **Occupancy Rate**:
   - **Action**: Review and refine tenant intake and selection processes based on feedback and performance data.
   - **Goal**: Maintain an occupancy rate of at least 95%.
3. **Physical Condition**:
   - **Action**: Finalize and implement the Capital Fund 5-Year Action Plan.
   - **Goal**: Ensure long-term sustainability of physical improvements.
4. **Financial Performance**:
   - **Action**: Submit audited financial statements for the fiscal year ending 9/30/2024.
   - **Goal**: Achieve a FASS score of at least 15 out of 25 points.
5. **Technology Improvements**:
   - **Action**: Continue to monitor and optimize the use of new technology to ensure ongoing efficiency improvements
   - **Goal**: Maintain streamlined operations and improve overall performance.
6. **Rebranding**:
   - **Action**: Evaluate the impact of the rebranding efforts and make necessary adjustments
   - **Goal**: Ensure the new brand resonates with the community and enhances the agency's image.

Redevelopment or Demolition and Development Plan for Stewart Manor Senior Development
1. **Month 1-2**:
   - **Action**: Conduct a detailed Physical Needs Assessment (PNA) for Stewart Manor Senior Development.
   - **Goal**: Identify the extent of repairs needed and evaluate the feasibility of redevelopment versus demolition and new development.
2. **Month 3-4**:
   - **Action**: Based on the PNA results, decide whether to proceed with redevelopment or demolition and new development.
      - **Redevelopment**: Plan for comprehensive rehabilitation using a combination of bonds, tax credits, and other financing methods.
      - **Demolition and Development**: Develop a site plan for the new construction, ensuring it meets the needs of senior residents and complies with local regulations.
   - **Goal**: Secure funding and approvals for the chosen path.
3. **Month 5-6**:
   - **Action**: If redevelopment is chosen, begin rehabilitation, focusing on critical repairs and upgrades.
      - If demolition and new development are chosen, start the demolition process and prepare the site for new construction.
   - **Goal**: Ensure the project is on track and aligned with the overall strategic plan for improving the property's physical condition

Sanford Housing Authority

October 27, 2023

Ms. Sheila Hester, Director
Department of Housing and Urban Development
Greensboro Field Office
Office of Public Housing
1500 Pinecroft Road, Suite 401 Asheville Building
Greensboro, NC 27407-3838

Re: Troubled Designation Recovery Plan

Dear Ms. Hester:

We are in receipt of an official "Troubled" designation letter from the Department of Housing and Urban Development (HUD) for the Sanford Housing Authority (SHA) addressed to Ms. Hope White, Chair of the Sanford Housing Authority Board of Commissioners dated September 28, 2023, and signed by you. As documented in your letter, the SHA received an overall score of 46 out of 100 on our September 30, 2022, PHAS Score Report. As a result of our Troubled designation, we are required to submit to your office a Recovery Plan that details how the housing authority will improve our PHAS score during the next scoring period to reflect a "50% recovery of the Troubled PHAS score on the first released PHAS assessment that is at least 12 months after the Troubled designation." Our Plan will reflect that, but as equally important to the recovery is the sustained revitalization and long-term financial stability of the SHA.

The recovery of the SHA started October 2022, when the Board of Commissioners hired a seasoned executive director with over twenty-five (25) years of experience leading housing authorities in North Carolina and Florida. This hire was critical given his experience in leading a "Troubled" housing authority to a "High Performer" housing authority and maintaining that designation for the entirety of his tenure with that agency. Moreover, his relationships with local government officials with the City of Sanford and Lee County Government have re-opened doors of communication that will ultimately benefit our agency. Under his leadership more qualified staff have been hired in key senior level positions and much needed training of front-line staff has occurred. Internally, we can already see signs of progress through increased rental revenue, higher occupancy of public housing units, better inventory control, and more qualified maintenance staff making repairs in units that traditionally were contracted out to local companies at a much higher cost to the agency.

We recognize the significant obstacles we face with the deteriorated conditions of some of our public housing stock, residents' distrust based on past experiences, and insufficient funding to address our capital needs. However, during the last six (6) months we have taken steps to reorganize management, developed short-term plans to improve maintenance functions, successfully procured appliances and other needed supplies, decreased days that units are off-line between move-out and move-in, improved our rent collection process, and mandated accountability from every staff person employed by the SHA.

What you will find in the attached spreadsheet is our plan for recovery with desired outcomes, performance measurements, target dates and remedies. We are confident our short-term plans already implemented, along with this Recovery Plan, will serve as the road map for a complete financial, management, and operational recovery of the SHA and result in removal from the Troubled designation list.

If you have any questions or comments concerning this Recovery Plan, please contact me at 919-776-7655.

Sincerely,

Marcus D. Goodson

Marcus D. Goodson
Interim CEO

Attachment

SHA TROUBLED RECOVERY PLAN-OCTOBER 2023

ITEM #	CATEGORY	RESULTS FROM PHAS ASSESMENT	DESIRED OUTCOME	PERFORMANCE MEASUREMENT	TARGET DATE	DATE ACCOMPLISHED	REMEDIES
Substantial Improvement							
SI 01	Oversight	SHA management has been ineffective in maintaining the agency's performance at an acceptable level leading to a failing PHAS score, a Troubled designation, and an increase in HUD oversight of our daily operations from the Field Office level.	A 50% recovery of the Troubled PHAS score on the first released PHAS assessment that is at least 12 months after our Troubled designation. A full recovery to a PHAS score of 60 or higher on the next sequential fiscal year PHAS assessment.	The Financial indicator will be at 15 out of 25. Physical indicator 30 out of 40. Management Indicator 15 out of 25. Capital Fund indicator 10 out of 10. For an overall score of 70 out of 100.	The next PHAs assessment by HUD for FYE 9/30/2024		Failure to achieve the stated score of at least 70 will require us to review this recovery plan to determine areas of improvement which will reflect in a score of 70 or better on the next scheduled PHAs assessment
Financial							
Financial 01	Staffing	SHA has been without a CFO for over 12 months, and it is critical that the Authority fill the CFO position to bring leadership and stability to the accounting/finance department.	Put the agency on a sound fiscal track to properly budget, prepare internal and HUD required financial reports timely, monitor expenses and restore our credit worthiness with vendors and suppliers.	Fiscally sound balance sheet and a score of 25 out of 25 on the PHAS Financial indicator.	FYE 2025	New CFO hired by end of first quarter 2024.	Will continue to work with third party accounting firm if CFO is not hired, or if hired but does not work out.
Financial 02	Admin Budget	Admin cost decreased by $101,000 last year due to relocating all residents from Stewart Manor eliminating expenses associated with managing that property	To relocate all residents from Stewart Manor, cut operating costs, and select co-developer partner to work with the housing authority to apply for tax-credits and other funding needed to renovate this property to place back on-line.	Completed relocation of all senior residents of Stewart Manor summer 2023 allowing for a substantial savings associated with operating a high-rise with numerous maintenance and mechanical issues.	Select co-developer partner First Quarter 2024, secure funding First Quarter 2025.	Relocation of residents, summer of 2023/Renovation of facility start date 2025.	If grant/loan funding is not secured for the complete renovation of Stewart Manor then we will pursue a more conventional loan(s) to fund the renovation work.

Financial 03	Admin Budget	SHA terminated the Security Contract saving the agency a cost of $117,000 per year	To reduce expenses on contracts that were no longer beneficial to the overall performance of the housing authority.	Review monthly crime reports as provided by Sanford Police Department and Lee County Sheriff Department to track crime data for our public housing developments.	First quarter 2023	Contract terminated second quarter 2023	If we see an increase of low-level crime occurring on our properties, we will enter into an above baseline contract with local law enforcement to patrol our developments using a select group of police officers.
Financial 04	Admin Budget	SHA decreased the budget by $240,000 per year by cutting maintenance costs for labor, supplies and equipment.	To decrease agency spending in areas that would not reduce or impeded our ability to deliver quality maintenance services to our residents.	We are still evaluating the impact of this decrease in the maintenance budget and how it will affect the agency over time.	FYE 2023	Ongoing annual review to determine positive or negative impact on operations.	Apply the funds back to the maintenance department to ensure the maintenance staff has to materials and supplies they need to complete the repairs to the units.

Management

Management 01	Vacancies	Average vacant unit turnaround time for the authority during the past 12 months and in the post-COVID year of 2021 was 250 days. SHA's target turnaround time is a maximum of 14 days. Both Management and Maintenance contributed to the delay in occupying units. SHA has developed a Vacant Unit Turn Policy. Vacant units are to be tracked by the Property Manager daily through the computer software. Pre-Moveout Inspections have been established to provide management and maintenance with the opportunity to create a plan of action identifying materials and supplies needed for a quick unit turn. A final move-out inspection will be completed which will identify the length of time needed to complete the unit turn.	To turn vacant units in a timely manner to improve occupancy rate.	Unit occupancy percentage will increase from 50% to 95% or better.	To be at 95% occupancy or better by 2/28/2024	End of first quarter 2024	If we don't meet our target timelines using in-house maintenance staff for unit turns, we will contract out to third-party contractors to perform our unit turn work.
Management 02	Occupancy Rate	Management is responsible for making Ready Files from the waitlist and maintaining Ready Files for each bedroom size to lessen the amount of time it takes to pull a name from the waitlist. Applicants will be notified by phone, mail, and email to help lessen the amount of time to contact an applicant. Applicants will be sent an offer letter with a definitive timeframe to either accept or deny the available unit. Management will maintain a viable waitlist by purging the waitlist two (2) times per year. Management will manage the waitlist to ensure the list is opened and closed as often as necessary.	To maintain an occupancy rate of 98% or better.	Units to be occupied quicker to maintain an occupancy rate of 98% or better.	Target to purge the waitlist and have ample Ready Files by 2/28/2024.	End of first quarter 2024	To seek peer-to-peer training with well managed High Performer PHAs and contract with property management consultants that focus on resident file preparation.

| Management 03 | MOD/HUD Approved Units | Some fire and mod units accumulated a large number of days and/or exceed HUD permissible days to remain in HUD Approved status. Vendors were not contracted, and insurance claims were not completed causing vacant units to sit for longer than 365 days. Management will create a scope of work to be done and put the job out for bid to local contractors. Insurance claims will be processed quickly, and contractors will be sought to bring the offline units back as quickly as possible. Management will monitor the offline units to ensure they do not exceed the HUD limit. Following SHA's Procurement Policy will aid in the contracting of vendors. | To decrease the number of HUD approved units off-line and placed back in service. | Units will be under contract for repairs so the units can be placed back on-line. | Offline units will be under contract by December 2023. | End of first quarter 2024 | Use outside contractors and SHA maintenance staff simultaneously to prep units to be placed back on-line to shorten the time the units are off-line. |
| Management 04 | Property Management Capacity and Staff Vacancies | Asset management capacity is limited. SHA has limited management capacity and will be setting up training and as well as hiring more qualified staff. Public Housing Property Manager's position has been posted as has the Assistant Property Manager's position. SHA has posted the positions on the Carolina Council Housing Redevelopment website to attract more qualified individuals. SHA expects to interview and hire new staff within the next 45 days. | New housing manager will bring knowledge, skills, and ability to help staff bring the property to a higher level. | Occupancy data, timely rent collection, work order completion times and unit turn trends. | 11/2024 | 11/2024 | Consider using third-party management company in the event SHA staff cannot accomplish our stated goals and objectives for each development. |

| Management 05 | Written Procedures | SHA must update and/or create policies and procedures for staff to follow and be held accountable to adhere to. Written policies and procedures must be updated as needed and created where needed in all areas of housing management from management operations to maintenance operations. Written procedures and standards do not cover a number of areas of operations and processes. Staff currently receives training on new HUD procedures and SOP for SHA. | To increase the knowledge, skills, and ability of staff to perform at a high level in public housing operations and maintenance. | Staff will be able to manage each development in a more professional manner creating a harmonious environment where families can live and enjoy their homes. | Ongoing as new developments and situations arise. | End of second quarter 2024. | Seek peer-to-peer training with well managed High Performer PHAs and request TA through the HUD Greensboro Field Office. |
| Management 06 | Property Management Reporting | The Property management staff appear to lack the knowledge, skills, and ability to perform many of the duties of property management. Staff's familiarity and lack of self-motivation with some of the reporting that is available in the software system is evident because they do not present any self-initiated attempt to run reports. Reporting is key to management and oversight of vacancies, maintenance, and other areas and without learning the software or pursuing help to learn the software presents a problem with management not having the ability to present information to upper management or to produce a written report. Property management staff should receive training or refresher training on how to use all modules and reporting capabilities of the Yardi system or any subsequent software the agency may decide to use. | To increase the property management staff's ability to know their development stats and for staff to be able to present a report on their development. | More accurate data on each development that will then be used to properly manage the development and make sound fiscal decisions going forward. | Staff will be expected to report on their developments by November 20, 2023. | End of second quarter 2024. | Seek peer-to-peer training with well managed High Performer PHAs and request TA through the HUD Greensboro Field Office. |

| Management 07 | Receivables | SHA continues to have poor rent collection even after all COVID period ended. Receivables were high and grew over the year, and collections were below 90%. Property management staff should take steps to insure that property management staff track collections daily during the first eight days of the month and residents who are late on rent receive notice of their late rent. Going forward property management staff should ensure that rent is paid in a timely manner per the lease agreements. If rent is not paid on time, tenants must be served with notice and referred to resident services for assistance in money management training. | To have all developments at a rent collection rate of 98% or better. | Rent collection and other charges will start to increase as tenants are held accountable for paying their monthly rent to SHA. | Tenants are currently being informed and educated about paying rent on time and will continue to be informed until all rent collections are at or above 98% or better by 1/31/2024. | End of second quarter 2024. | To seek peer-to-peer training with well managed High Performer PHAs and contract with industry consultants that focus on property management and rent collection strategies. |

Physical					
Physical 01	Inspection Score	SHA's public housing developments Linden Heights/Utley Plaza/Foushee Heights received a REAC Inspection score of 49 and Harris Court received a score of 75.	Increase the Inspection Score to a 75 or higher for all public housing units in the next round of the new NSPIRE Inspections by training staff on inspecting units. SHA has already put into place Quarterly Inspections of all units, created a preventative maintenance plan, and is working to improve the scores for the next inspection. SHA staff will conduct Pre-NSPIRE inspections and generate work orders as needed. Staff will continue to educate the residents and hold them accountable for keeping their units in decent, safe, and sanitary condition.	The management staff should see improvements in their quarterly inspections and work orders generated by tenants should decrease with the new plans put into place. Management should also see higher NSPIRE scores when HUD comes out to inspect.	Improving inspection scores is a work in progress and will continue each day.	End of third quarter 2024	To seek peer-to-peer training with well managed High Performer PHAs and contract with industry consultants that focus on property management and physical inspection training for the newly implemented NSPIRE.
Capital Fund					
CF 01	Procurement	Implement monthly staff meetings attended by staff that deal with procurement of outside vendors and suppliers.	Monthly meetings should keep staff informed as to what procurement of services are needed so the timely procurement of those services and contracts happen in a way to benefit the operations of the agency.	The outcome should be more timely contracts and procurement of services on an as needed basis.	01/2024	End of first quarter 2024	Consider paid training for staff through trade organizations such as NAHRO and PHADA.

CF 02	Procurement	Ongoing Training	Recommend ongoing training for staff and new hires that will be part of the procurement process. Initiate procurement and purchasing training at new hire stage and follow up training as needed. This will keep staff up to speed on all new relevant and procurement changes.	Through training staff should become more specialized in the procurement processes which will assist with procuring more skilled third-party contractors who can provide better quality services at more competitive prices.	01/2024	End of first quarter 2024	Consider peer-to-peer training with well managed High Performer PHAs and seek TA through the HUD Greensboro Field Office.
CF 03	Procurement	Create Vendor/Contractor Pool	Create and establish a pool of vendors/contractors to utilize for meeting emergency needs of SHA	By creating and utilizing a contractor/vendor pool we establish a dependable list of contractors/vendors to call when needed repairs or emergencies happen	01/2024	End of first quarter 2024	Contact State of NC General Contractors Association for list of approved contractors in the Lee County area.
CF 04	Procurement	Review and Update Procurement Policy of all cutting-edge procurement practices commonly used throughout the industry.	The creation of a newly revised Procurement Policy.	We need to update our Procurement Policy annually so that staff can be as flexible as possible within policy guidelines when seeking third-party contractors/vendors to procure.	01/2024	End of first quarter 2024	Reach out to well managed High Performer PHAs in NC for copies of their Procurement Policy to see where we can improve our Policy.

SHA TROUBLED RECOVERY PLAN-OCTOBER 2023

ITEM #	CATEGORY	RESULTS FROM PHAS ASSESMENT	DESIRED OUTCOME	PERFORMANCE MEASUREMENT	TARGET DATE	DATE ACCOMPLISHED	REMEDIES
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Financial							
Financial 01	Staffing	SHA has been without a CFO for over 12 months, and it is critical that the Authority fill the CFO position to bring leadership and stability to the accounting/finance department.	Put the agency on a sound fiscal track to properly budget, prepare internal and HUD required financial reports timely, monitor expenses and restore our credit worthiness with vendors and suppliers.	Fiscally sound balance sheet and a score of 25 out of 25 on the PHAS Financial indicator.	FYE 2025	New CFO hired by end of first quarter 2024.	Will continue to work with third party accounting firm if CFO is not hired, or if hired but does not work out.
Financial 02	Admin Budget	Admin cost decreased by $101,000 last year due to relocating all residents from Stewart Manor eliminating expenses associated with managing that property	To relocate all residents from Stewart Manor, cut operating costs, and select co-developer partner to work with the housing authority to apply for tax-credits and other funding needed to renovate this property to place back on-line.	Completed relocation of all senior residents of Stewart Manor summer 2023 allowing for a substantial savings associated with operating a high-rise with numerous maintenance and mechanical issues.	Select co-developer partner First Quarter 2024, secure funding First Quarter 2025.	Relocation of residents, summer of 2023/Renovation of facility start date 2025.	If grant/loan funding is not secured for the complete renovation of Stewart Manor then we will pursue a more conventional loan(s) to fund the renovation work.

Financial 03	Admin Budget	SHA terminated the Security Contract saving the agency a cost of $117,000 per year	To reduce expenses on contracts that were no longer beneficial to the overall performance of the housing authority.	Review monthly crime reports as provided by Sanford Police Department and Lee County Sheriff Department to track crime data for our public housing developments.	First quarter 2023	Contract terminated second quarter 2023	If we see an increase of low-level crime occurring on our properties, we will enter into an above baseline contract with local law enforcement to patrol our developments using a select group of police officers.
Financial 04	Admin Budget	SHA decreased the budget by $240,000 per year by cutting maintenance costs for labor, supplies and equipment.	To decrease agency spending in areas that would not reduce or impeded our ability to deliver quality maintenance services to our residents.	We are still evaluating the impact of this decrease in the maintenance budget and how it will affect the agency over time.	FYE 2023	Ongoing annual review to determine positive or negative impact on operations.	Apply the funds back to the maintenance department to ensure the maintenance staff has to materials and supplies they need to complete the repairs to the units.

Management

Management 01	Vacancies	Average vacant unit turnaround time for the authority during the past 12 months and in the post-COVID year of 2021 was 250 days. SHA's target turnaround time is a maximum of 14 days. Both Management and Maintenance contributed to the delay in occupying units. SHA has developed a Vacant Unit Turn Policy. Vacant units are to be tracked by the Property Manager daily through the computer software. Pre-Moveout Inspections have been established to provide management and maintenance with the opportunity to create a plan of action identifying materials and supplies needed for a quick unit turn. A final move-out inspection will be completed which will identify the length of time needed to complete the unit turn.	To turn vacant units in a timely manner to improve occupancy rate.	Unit occupancy percentage will increase from 50% to 95% or better.	To be at 95% occupancy or better by 2/28/2024	End of first quarter 2024	If we don't meet our target timelines using in-house maintenance staff for unit turns, we will contract out to third-party contractors to perform our unit turn work.
Management 02	Occupancy Rate	Management is responsible for making Ready Files from the waitlist and maintaining Ready Files for each bedroom size to lessen the amount of time it takes to pull a name from the waitlist. Applicants will be notified by phone, mail, and email to help lessen the amount of time to contact an applicant. Applicants will be sent an offer letter with a definitive timeframe to either accept or deny the available unit. Management will maintain a viable waitlist by purging the waitlist two (2) times per year. Management will manage the waitlist to ensure the list is opened and closed as often as necessary.	To maintain an occupancy rate of 98% or better.	Units to be occupied quicker to maintain an occupancy rate of 98% or better.	Target to purge the waitlist and have ample Ready Files by 2/28/2024.	End of first quarter 2024	To seek peer-to-peer training with well managed High Performer PHAs and contract with property management consultants that focus on resident file preparation.

Management 03	MOD/HUD Approved Units	Some fire and mod units accumulated a large number of days and/or exceed HUD permissible days to remain in HUD Approved status. Vendors were not contracted, and insurance claims were not completed causing vacant units to sit for longer than 365 days. Management will create a scope of work to be done and put the job out for bid to local contractors. Insurance claims will be processed quickly, and contractors will be sought to bring the offline units back as quickly as possible. Management will monitor the offline units to ensure they do not exceed the HUD limit. Following SHA's Procurement Policy will aid in the contracting of vendors.	To decrease the number of HUD approved units off-line and placed back in service.	Units will be under contract for repairs so the units can be placed back on-line.	Offline units will be under contract by December 2023.	End of first quarter 2024	Use outside contractors and SHA maintenance staff simultaneously to prep units to be placed back on-line to shorten the time the units are off-line.
Management 04	Property Management Capacity and Staff Vacancies	Asset management capacity is limited. SHA has limited management capacity and will be setting up training and as well as hiring more qualified staff. Public Housing Property Manager's position has been posted as has the Assistant Property Manager's position. SHA has posted the positions on the Carolina Council Housing Redevelopment website to attract more qualified individuals. SHA expects to interview and hire new staff within the next 45 days.	New housing manager will bring knowledge, skills, and ability to help staff bring the property to a higher level.	Occupancy data, timely rent collection, work order completion times and unit turn trends.	11/2024	11/2024	Consider using third-party management company in the event SHA staff cannot accomplish our stated goals and objectives for each development.

Management 05	Written Procedures	SHA must update and/or create policies and procedures for staff to follow and be held accountable to adhere to. Written policies and procedures must be updated as needed and created where needed in all areas of housing management operations to maintenance operations. Written procedures and standards do not cover a number of areas of operations and processes. Staff currently receives training on new HUD procedures and SOP for SHA.	To increase the knowledge, skills, and ability of staff to perform at a high level in public housing operations and maintenance.	Staff will be able to manage each development in a more professional manner creating a harmonious environment where families can live and enjoy their homes.	Ongoing as new developments and situations arise.	End of second quarter 2024.	Seek peer-to-peer training with well managed High Performer PHAs and request TA through the HUD Greensboro Field Office.
Management 06	Property Management Reporting	The Property management staff appear to lack the knowledge, skills, and ability to perform many of the duties of property management. Staff's familiarity and lack of self-motivation with some of the reporting that is available in the software system is evident because they do not present any self-initiated attempt to run reports. Reporting is key to management and oversight of vacancies, maintenance, and other areas and without learning the software or pursuing help to learn the software presents a problem with management not having the ability to present information to upper management or to produce a written report. Property management staff should receive training or refresher training on how to use all modules and reporting capabilities of the Yardi system or any subsequent software the agency may decide to use.	To increase the property management staff's ability to know their development stats and for staff to be able to present a report on their development.	More accurate data on each development that will then be used to properly manage the development and make sound fiscal decisions going forward.	Staff will be expected to report on their developments by November 20, 2023.	End of second quarter 2024.	Seek peer-to-peer training with well managed High Performer PHAs and request TA through the HUD Greensboro Field Office.

Management 07	Receivables	To have all developments at a rent collection rate of 98% or better.	SHA continues to have poor rent collection even after all COVID period ended. Receivables were high and grew over the year, and collections were below 90%. Property management staff should take steps to insure that property management staff track collections daily during the first eight days of the month and residents who are late on rent receive notice of their late rent. Going forward property management staff should ensure that rent is paid in a timely manner per the lease agreements. If rent is not paid on time, tenants must be served with notice and referred to resident services for assistance in money management training.	Rent collection and other charges will start to increase as tenants are held accountable for paying their monthly rent to SHA.	Tenants are currently being informed and educated about paying rent on time and will continue to be informed until all rent collections are at or above 98% or better by 1/31/2024.	End of second quarter 2024.	To seek peer-to-peer training with well managed High Performer PHAs and contract with industry consultants that focus on property management and rent collection strategies.

Physical						
Physical 01	Inspection Score	SHA's public housing developments Linden Heights/Utley Plaza/Foushee Heights received a REAC Inspection score of 49 and Harris Court received a score of 75.	Increase the Inspection Score to a 75 or higher for all public housing units in the next round of the new NSPIRE Inspections by training staff on inspecting units. SHA has already put into place Quarterly Inspections of all units, created a preventative maintenance plan, and is working to improve the scores for the next inspection. SHA staff will conduct Pre-NSPIRE inspections and generate work orders as needed. Staff will continue to educate the residents and hold them accountable for keeping their units in decent, safe, and sanitary condition.	The management staff should see improvements in their quarterly inspections and work orders generated by tenants should decrease with the new plans put into place. Management should also see higher NSPIRE scores when HUD comes out to inspect.	Improving inspection scores is a work in progress and will continue each day.	End of third quarter 2024	To seek peer-to-peer training with well managed High Performer PHAs and contract with industry consultants that focus on property management and physical inspection training for the newly implemented NSPIRE.
Capital Fund						
CF 01	Procurement	Implement monthly staff meetings attended by staff that deal with procurement of outside vendors and suppliers.	Monthly meetings should keep staff informed as to what procurement of services are needed so the timely procurement of those services and contracts happen in a way to benefit the operations of the agency.	The outcome should be more timely contracts and procurement of services on an as needed basis.	01/2024	End of first quarter 2024	Consider paid training for staff through trade organizations such as NAHRO and PHADA.

CF 02	Procurement	Ongoing Training	Recommend ongoing training for staff and new hires that will be part of the procurement process. Initiate procurement and purchasing training at new hire stage and follow up training as needed. This will keep staff up to speed on all new relevant and procurement changes.	Through training staff should become more specialized in the procurement processes which will assist with procuring more skilled third-party contractors who can provide better quality services at more competitive prices.	01/2024	End of first quarter 2024	Consider peer-to-peer training with well managed High Performer PHAs and seek TA through the HUD Greensboro Field Office.
CF 03	Procurement	Create Vendor/Contractor Pool	Create and establish a pool of vendors/contractors to utilize for meeting emergency needs of SHA	By creating and utilizing a contractor/vendor pool we establish a dependable list of contractors/vendors to call when needed repairs or emergencies happen	01/2024	End of first quarter 2024	Contact State of NC General Contractors Association for list of approved contractors in the Lee County area.
CF 04	Procurement	Review and Update Procurement Policy of all cutting-edge procurement practices commonly used throughout the industry.	The creation of a newly revised Procurement Policy.	We need to update our Procurement Policy annually so that staff can be as flexible as possible within policy guidelines when seeking third-party contractors/vendors to procure.	01/2024	End of first quarter 2024	Reach out to well managed High Performer PHAs in NC for copies of their Procurement Policy to see where we can improve our Policy.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Greensboro Field Office
Office of Public Housing
1500 Pinecroft Road, Suite 401, Asheville Building
Greensboro, North Carolina 27407-3838
336-547-4000
www.hud.gov • espanol.hud.gov

September 28, 2023

Board of Commissioners
c/o Hope White, Chair
Sanford Housing Authority
602 Old Mill Road
Sanford, NC 27330

Dear Commissioners:

On August 9, 2023, the Sanford Housing Authority was designated Troubled by HUD based on a failing Public Housing Assessment System audited Financial score of (**9 of 25**), physical score of (**24 of 40**), Management score of (**8 of 25**), Capital Fund score of (**5 of 10**), and an overall score of (**46 of 100**) for the fiscal year ending 9/30/2022 as shown in the enclosed PHAS Score Report.

It is critical that the Agency assess its current situation to determine if recovery is feasible or if alternative options for affordable housing should be considered. The Board of Commissioners/Governing Body of the Sanford Housing Authority should take immediate action to identify the sources(s) of the performance deficiencies and develop and implement a plan to determine if an acceptable PHAS score can be achieved and sustained or to identify other uses for the housing subsidies.

The following list of actions is offered as common suggestions to the Board to use in self-diagnosing the source(s) of its deficiencies and identifying solutions to recover its performance for long-term sustainability.

<u>Financial</u>

Typically, when a public housing agency becomes financially substandard, it must either: (1) increase revenue; (2) decrease expenses; or (3) implement a combination of both.

Revenue

- Evaluate tenant screening, lease enforcement, and rent collection policies and actions to increase tenant rental revenue.
- Consider establishing or raising minimum rents.
- Consider obtaining approval from HUD to reposition non-performing Public Housing property or non-residential property covered under a HUD Declaration of Trust.
- Consider selling unencumbered property.
- Consider obtaining unrestricted non-Federal funding from State or local government

agencies to improve the financial position of the Public Housing program.
- Consider reducing the scope of non-federal programs to operate within their financial means.

Expenses

- Consider reducing salaries and employee benefits to levels that stay within budget parameters.
- Consider reducing management and line staffing levels.
- Evaluate utility consumption, energy policies, and consider implementation of energy conservation measures and agreements to reduce energy costs.
- Evaluate all existing contracts for cost and necessity.
- Evaluate and re-bid insurance costs.
- Evaluate the need and usage of fleet vehicles.
- Evaluate the cost allocation plan if agency operates more than Public Housing.
- Consider contracting property management or maintenance of Public Housing to another entity or public housing agency.

Physical

When a public housing agency becomes physically substandard, it typically has either: (1) failed to prioritize capital funding; or (2) failed to correct deficiencies identified in previous REAC inspections reports.

Capital Funding

- Evaluate current contracts for priority and necessity in relationship to needed capital funding.
- Account for the amount of capital funds received and purchases made to date.
- Verify that capital funds are not being used for non-capital purposes.
- Evaluate the most recent physical needs assessment or conduct a new one.
- Evaluate the use of resources for underfunded maintenance and modernization needs rather than for development.

Physical Inspection Deficiencies

- Verify that required annual inspections by the public housing agency are being conducted and that generated work orders are being completed timely.
- Evaluate maintenance staffing levels, skill levels, and performance as well as how maintenance staff are deployed.
- Evaluate the maintenance plan as well as the planning efforts for REAC inspections.

- Evaluate the use of previous REAC inspection reports for capital fund and maintenance planning.
    o Verify whether health and safety deficiencies, which are cause for heavily weighted point deductions, are being targeted for immediate repairs. (These include tripping hazards, sharp edges, blocked exits, mold and mildew, exposed electrical wiring, fire hazards, improper storage of flammable or volatile materials, and pest infestations.)
    o Verify whether critical and severe deficiencies, which are cause for a magnitude of point deductions for each inspectable area, are being targeted for repairs. (These include site issues such as fences, grounds, mailboxes, graffiti/litter, parking lots, driveways, roads, walkways and steps, play areas, refuse disposal areas, and storm drains; and building systems issues such as sanitary systems, domestic water systems, elevators, HVAC systems, sprinkler systems for fire protection, emergency power records and auxiliary lighting, and electrical systems.)
    o Verify whether the most common and frequent deficiencies are being repaired sufficiently. (These include damaged interior and exterior walls, roof components, common area hallways and stairways, utility closets/rooms, kitchen appliances, window screens and locks, door surfaces and hardware/locks, and peeling paint.)
- Consider contracting maintenance of Public Housing to another entity or public housing agency.
- Consider a repositioning strategy for the agency's assets if conversion to the Section 8 platform would allow for improved management of the properties.

Management

Generally, when a public housing agency becomes management substandard, it has failed to maintain an acceptable occupancy level in its developments.

- Evaluate waiting list, tenant selection, and initial certification processes to ensure coordination with property managers and timely preparation for move-ins.
- Assess existing new tenant intake policies and practices and consider implementing those that would contribute to quicker lease up, such as starting the certification process earlier or limiting the number of unit-offer turn-downs for new tenants.
- Assess existing continued occupancy policies and practices and consider implementing those that would reduce the frequency of move-outs, such as educating tenants on lease enforcement and how to be good renters or limiting transfers for existing tenants.
- Assess the impact of current operating protocols for late rent payments as well as timely payments to vendors.
- Evaluate the turn-around time of vacant units for occupancy, including the time it takes maintenance to make-ready units and the time it takes property managers to lease up

units.

- Assess the feasibility and desirability of under-occupied developments, e.g. physical condition and configuration, rehabilitation costs and lifespan, neighborhood factors such as crime and proximity to employment, transportation, and services, etc., and consider repositioning options if appropriate.
- Ensure that units taken offline for modernization, special use, or other allowed reasons have been approved by HUD, do not exceed their permissible time limitation and are correctly classified in HUD systems.
- Consider contracting property management of Public Housing to another entity or public housing agency.

Capital Fund

A designation of Troubled based on Capital Funds results from failure of the public housing agency to obligate its Capital Funds timely.

- Evaluate management/staff performance, timeliness, and effectiveness in procurement and contracting functions, e.g., preparing solicitations, evaluating bids, entering obligation information into HUD systems, and maintaining documentation.
- Evaluate management/staff ability to prepare award recommendations for Board review and approval.
- Confirm that the Board receives and approves contract awards timely and in advance of obligation deadlines.
- Verify that staff are correctly identified in and have access to HUD systems.

Please provide our office with a proposed recovery plan within 30 days of the receipt of this letter. Your plan will be reviewed by a Recovery Team of subject matter experts to determine further assistance to be provided by HUD and actions to be taken.

Please also be advised that HUD is initiating actions to develop and execute a binding Recovery Agreement with the Sanford Housing Authority as required by federal statute, to document and ensure that recovery efforts have been put in place and the Agency achieves and sustains acceptable performance or identifies other opportunities for affordable housing. If the assessment determines that Public Housing can be sustained and improved, the Recovery Agreement will include recovery benchmarks in accordance with statutory requirements, implemented by regulations found at 24 CFR 902.75(d). Specifically, the Sanford Housing Authority must meet two sequential benchmarks after being designated Troubled: 1) a 50% recovery of the Troubled PHAS score on the first released PHAS assessment that is at least 12 months after the Troubled designation – that is to say, a minimum PHAS score for that period of 53 (i.e.one-half of difference between Troubled score and 60) and 2) a full recovery to a PHAS score of 60 or higher on the next sequential fiscal year PHAS assessment.

If you have any questions or need assistance in developing your plan, please contact me at Shelia.M.Hester@hud.gov.

Sincerely,

SHELIA HESTER
Digitally signed by: SHELIA HESTER
DN: CN = SHELIA HESTER C = US O = U.S. Government OU = Department of Housing and Urban Development, Office of Administration
Date: 2023.09.28 17:05:04 -04'00'

Shelia Hester, Director
Office of Public Housing
Office of Field Operations
U. S. Department of Housing and Urban
Development

Enclosure

cc:
Willam Newby, Commissioner
Wnewby12@yahoo.com
P.O. Box 1865
Sanford, NC 27331

Carolyn Gilchrist, Commissioner
Gilchrist0514@gmail.com
603 N. Steele Street
Sanford, NC 27330

Dr. Karen Wicker, Commissioner
Mrswicker2000@yahoo.com
1302 Spring Ln.
Sanford, NC 27330

Holly Aeschliman, Commissioner
1105 Wilkins Drive
Sanford, NC 27330
hollyaeschliman@gmail.com

Erin Britton, Commissioner
1501 Cranberry Lane
Sanford, NC 27330
eacampion@gmail.com

Marcus Goodson, Executive Director
mgoodson@sha-nc.org

U.S. Department of Housing and Urban Development

OFFICE OF PUBLIC AND INDIAN HOUSING
REAL ESTATE ASSESSMENT CENTER

Public Housing Assessment System (PHAS) Score Report for Interim

Report Date: 08/09/2023

PHA Code:	NC035
PHA Name:	Sanford Housing Authority
Fiscal Year End:	09/30/2022

PHAS Indicators	Score	Maximum Score
Physical	24	40
Financial	9	25
Management	9	25
Capital Fund	5	10
Late Penalty Points	0	
PHAS Total Score	**47**	**100**
Designation Status:	**Troubled**	

Published   08/09/2023   Initial published   08/09/2023

Financial Score Details	Score	Maximum Score
Unaudited/Single Audit		
1. FASS Score before deductions	8.99	25
2. Audit Penalties	0.00	
Total Financial Score Unrounded (FASS Score - Audit	8.99	25

Capital Fund Score Details	Score	Maximum Score
Timeliness of Fund Obligation:		
1. Timeliness of Fund Obligation %	90.00	
2. Timeliness of Fund Obligation Points	5	5
Occupancy Rate:		
3. Occupancy Rate %	60.82	
4. Occupancy Rate Points	0	5
Total Capital Fund Score (Fund Obligation + Occupancy Rate):	5	10

Notes:

1. The scores in this Report are the official PHAS scores of record for your PHA. PHAS scores in other systems are not to be relied upon and are not being used by the Department.

2. Due to rounding, the sum of the PHAS indicator scores may not equal the overall PHAS score.

3. "0" FASS Score indicates a late presumptive failure. See 902.60 and 902.92 of the Interim PHAS rule.

4. "0" Total Capital Fund Score is due to score of "0" for Timeliness of Fund Obligation. See the Capital Fund

5. PHAS Interim Rule website - http://www.hud.gov/offices/reac/products/prodphasintrule.cfm

RESOLUTION
2025-03

RESOLUTION NO. 2025-03

RESOLUTION TO REVISE PERSONNEL POLICY REGARDING WORK FROM HOME (WFH) POLICY

WHEREAS, the Sanford Housing Authority (SHA) recognizes the evolving nature of the workplace and the benefits of offering flexible work arrangements to its employees; and

WHEREAS, remote/telecommuting/virtual work, also known as work from home (WFH), allows employees to work at home, on the road, or in a satellite location for all or part of their workweek; and

WHEREAS, SHA considers remote/telecommuting/virtual work to be a viable, flexible work option in specific circumstances, including certain temporary or ad hoc situations when both the employee and the job are suited to such an arrangement and when specific skills and experiences are needed that the local labor market is not able to fulfill; and

WHEREAS, SHA aims to enhance its efforts to attract, recruit, and retain an articulate, talented, and diverse workforce of the best and the brightest in the affordable housing industry by offering remote and hybrid work environments; and

WHEREAS, SHA is committed to doing more with less, moving from paper to the cloud, and streamlining its operations through technology by embracing an online platform;

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Sanford Housing Authority hereby approves the revision of the Personnel Policy to include the following provisions regarding the Work From Home (WFH) policy:

1. **Eligibility:** Remote/telecommuting/virtual work may be appropriate for some employees and roles but not for others. It may be a business necessity that is determined by and approved by the CEO or their designee. Remote/telecommuting/virtual work is not an entitlement, it is not a SHA benefit, and it in no way changes the terms and conditions of employment with SHA Housing.

2. **Accountability and Monitoring of Productivity:** To ensure accountability and monitor productivity in remote/telecommuting/virtual work arrangements, SHA

will implement measures including clear objectives and goals, regular check-ins, performance metrics, time tracking tools, regular reporting, feedback mechanisms, and technology utilization.

3. **Remote and Hybrid Work Environment:** SHA offers remote and hybrid work environments so that its employees can work from locations other than the office. This new business model has enhanced SHA's efforts to attract, recruit, and retain a talented and diverse workforce. By doing more with less, moving from paper to the cloud, and streamlining its operations through technology, SHA is committed to modernizing its work processes and improving efficiency.

RECORDING OFFICER'S CERTIFICATION

I, Dr. Michael C. Threatt, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at the regular meeting of the Sanford Housing Authority held on January 27, 2025.

(SEAL)   By:

_____
Dr. Michael C. Threatt, Secretary

Work From Home (WFH) Policy

Remote/telecommuting/virtual work, also known as work from home (WFH), allows employees to work at home, on the road, or in a satellite location for all or part of their workweek. Sanford Housing Authority (SHA) considers remote/telecommuting/virtual work to be a viable, flexible work option in specific circumstances: in certain temporary or ad hoc situations when both the employee and the job are suited to such an arrangement and when specific skills and experiences are needed in which the local labor market is not able to fulfill.

Other situations may arise that are conducive to this type of work arrangement. Remote/telecommuting/virtual work may be appropriate for some employees and roles but not for others. Remote/telecommuting/virtual work may be a business necessity that is determined by and approved by the CEO or their designee. Remote/telecommuting/virtual work is not an entitlement, it is not a SHA benefit, and it in no way changes the terms and conditions of employment with SHA Housing.

Please see the telecommuting/virtual procedures.

Accountability and Monitoring of Productivity:
To ensure accountability and monitor productivity in remote/telecommuting/virtual work arrangements, SHA will implement the following measures:

1. **Clear Objectives and Goals:** Employees will have clearly defined objectives and goals that align with their roles and responsibilities. These will be regularly reviewed and updated as necessary.

2. **Regular Check-ins:** Supervisors will conduct regular check-ins with remote employees to discuss progress, address any challenges, and provide support. These check-ins can be scheduled weekly or bi-weekly, depending on the nature of the work.

3. **Performance Metrics:** Specific performance metrics will be established to measure productivity. These metrics may include project completion rates, quality of work, adherence to deadlines, and other relevant indicators.

4. **Time Tracking Tools:** Employees may be required to use time tracking tools to log their work hours and activities. This helps ensure that work hours are being utilized effectively and provides transparency.

5. **Regular Reporting:** Employees will be required to submit regular reports detailing their work activities, progress on projects, and any issues encountered. This can be done through weekly status reports or project management software.

6. **Feedback Mechanisms:** A system for providing and receiving feedback will be in place to ensure continuous improvement. This includes performance reviews, peer feedback, and self-assessments.

7. **Technology Utilization:** Utilizing collaboration and communication tools such as video conferencing, instant messaging, and project management platforms to maintain connectivity and streamline workflows.

Remote and Hybrid Work Environment:
SHA offers remote and hybrid work environments so that its employees can work from locations other than the office. This new business model has enhanced SHA's efforts to attract, recruit, and retain an articulate, talented, and diverse workforce of the best and the brightest in the affordable housing industry. By doing more with less, moving from paper to the cloud, and streamlining its operations through technology by embracing an online platform, SHA is committed to modernizing its work processes and improving efficiency.

By incorporating these accountability measures, SHA aims to maintain high productivity levels and ensure that remote/telecommuting/virtual work arrangements are successful for both the organization and its employees.

CEO REPORTS

Sanford Housing Authority (SHA)
Board of Commissioners Regular Meeting

Date: January 2025 CEO Report

A. Third-Party Management Company RFP Update

- The Third-Party Management Company RFP Committee met on January 13, 2025, for a lunch and learn session. The committee received four proposal binders and scoring sheets. The leadership team will finalize the scores, create the resolution for board approval, and draft the award letter. Scores are due on February 14, 2025. After finalization, the scores will be presented to the Housing and Finance Committees, and a resolution will be created for approval at the February board meeting.

B. Phone System, Website, and Security Camera System Update

- **Phone System**: We are transitioning from Mitel to Teams. Hardware is expected next month. We will also roll out our customer service initiative and start training in MS Teams, facilitated by our new Executive Assistant to the CEO/Communications Coordinator, Ms. Sara Hudson, and Ms. Anesha Pittman.

- **Website**: The review process was delayed due to Ms. Hudson's onboarding. Meetings with the website development team will start the week of January 27th. We will analyze our social media channels and begin posting as part of our rebranding process.

- **Security Camera System (see supporting documents)**: Contracts are as follows:
    - Matthews: 5-year contract since 2022
    - Garden: 5-year contract since 2022
    - Gilmore: 3-year contract since 2022
    - Linden: 3-year contract since 2022

C. Rental Space Update

- After meeting with the landlord, we decided to continue renting on a month-to-month basis. We assessed the former administrative building for potential rehab, estimated at $600,000. At that amount, we could rehab our property at Carthage. We are exploring the feasibility of acquiring a loan for the Carthage Street location rehab and working with a restoration company.

D. Q2 Staff Retreat and Resident Council Meeting

- **Q2 Staff Retreat**: Scheduled for February 19-21, 2025. Activities include team-building sessions, reviewing the *Energy Bus* book, and participating in Colors personality

assessments to improve internal relationships. We will also discuss our rebranding strategy, including our new logo, mission, vision, values, and principles.

- **Resident Council Meetings**: I have started attending these meetings to build relationships and rapport with the residents of our properties. I plan to begin our listening sessions in March, after attending at least one Resident Council meeting at each site.

E. **Call Center for Maintenance Afterhours and Weekend**
   - (see supporting documents)

F. **Third-Party NSPIRE Inspection Assessment & REAC/NSPIRE Training**
   - (see supporting documents)

G. **Forensic Audit Proposal- Risk Management Insurance Update**
   - (see supporting documents)

H. **Operational Assessment for Housing Programs**
   - (see supporting documents)

I. **Trust Survey**
   - (see supporting documents)

SECURITY CAMERA SYSTEM

STOREDTECH
YOUR TECHNOLOGY | OUR PASSION

543 Queensbury Ave., Suite 5, Queensbury, NY 12804
t. 518-793-1111   f. 518-670-0120

Sold To

Sanford Housing Authority
Shannon Judd
1000 Carthage St.
Sanford, NC 27330
United States

Phone   919-776-7655
Fax

Your Sales Rep

Alan VanTassel
VP of Strategic Accounts
543 Queensbury Ave. Ste 5
Queensbury, NY 12804

518-793-1111 x1410
Quote@storedtech.com

Here is the quote you requested.

Qty	Description	Unit Price	Ext. Price
	Matthews' Cameras		
	Cameras		
17	CD42 Outdoor Dome Camera - 30 Day Retention -256 GB Storage - 5MP - 128 Degree Field of View - 15M IR Range	$935.22	$15,898.74
6	5MP Outdoor Bullet Camera - Zoom Lens - 30-Day Retention	$1,091.22	$6,547.32
2	Verkada CB51-TE Outdoor Bullet Camera - 5 MP - Telephone Lens - 30 Days Retention	$1,169.22	$2,338.44
	Camera Licenses - Options		
25	Verkada 1-Year Camera License (Optional)	$167.16	$4,179.00
25	3-Year Camera License (Optional)	$395.28	$9,882.00
25	5-Year License (Optional - SELECTED)	$647.28	$16,182.00
25	10-Year Camera License (Optional)	$1,295.28	$32,382.00
	Networking		
4	Ubiquiti NanoBeam AC Gen2 NBE-5AC-GEN2 IEEE 802.11ac 450 Mbit/s Wireless Bridge - 5 GHz - 9.3 Mile Maximum Outdoor Range - 1 x Network (RJ-45) - Ethernet, Fast Ethernet, Gigabit Ethernet	$215.00	$860.00
4	Antenna Mount	$35.57	$142.28
2	7x14x6 Vented Polycarbonate + ABS Weatherproof NEMA Enclosure with Cooling Fan, 120 VAC Outlets & Power Cord	$387.49	$774.98
1	Cisco Business 250 Series 250-24P-4G - Switch - L3 - smart - 24 x 10/100/1000 (PoE+) + 4 x Gigabit SFP - rack-mountable - PoE+ (195 W)	$589.03	$589.03

** Balance of total due upon delivery of hardware/software to client site.

STOREDTECH

Qty	Description	Unit Price	Ext. Price
1	Cisco Business 16 Port Switch - Switch - L3 - smart - 16 x 10/100/1000 (PoE+) + 2 x Gigabit SFP - rack-mountable - PoE+ (120 W)	$450.49	$450.49

Switching hardware is highly constrained. Estimated to ship from vendor in 273 days, but ETA may vary.

Cabling

29	Cat6 single outdoor drop. Price includes cable, terminations, and labor.	$205.00	$5,945.00

Professional Services

1	Storedtech Professional Services	$10,400.00	$10,400.00

Scope of Work

Objective:
Deploy Camera system as needed.

Customer Responsibilities:
Client will be responsible for allowing StoredTech access to any onsite locations necessary.
Client will work with StoredTech to allow a window for downtown to perform the upgrade (if required).
Client will provide lift as needed for any work out of reach of standard ladders.
Client will need to trench between buildings. 1.5"" conduit required for certain areas. Minimum 6" depth. Client will provide and install pull string for all piping.
* Client will need to provide power at each Panel box location. Client will be responsible for proper grounding at each panel box location.*
All cabling will be exposed on buildings and ran along soffits. Cabling will be properly secured.

Assumptions:
Items that are determined to be outside of this Scope of Work will require a Project Change Order.

Project Management Engagement

- Intro Call with Project Lead and SOW Review
- Assigned Project Manager with ongoing oversight
- Remote Meetings (Project Manager & Engineer)
- Close Out Call upon completion
- Project Survey sent upon completion
- Approximately 4 hours of PM services.

Acquire the technology you need today! Leasing options may be available for any quotes greater than $3,000. Please contact your Sales representative if you would like more information.

SubTotal		$60,128.28
Tax		$4,208.98
Shipping		$450.00
Total		**$64,787.26**

Deposit Required:	$48,590.45
Monthly Total:	$0.00

STOREDTECH

QUOTE

![STOREDTECH - YOUR TECHNOLOGY | OUR PASSION]

543 Queensbury Ave. Ste 5
Queensbury, NY 12804
t. 518-793-1111   f. 518-670-0120

Sold To

Sanford Housing Authority
Shannon Judd
1000 Carthage St.
Sanford, NC 27330
United States

Phone   919-776-7655
Fax

Your Sales Rep

Alan VanTassel
VP of Strategic Accounts
518-793-1111 x1410
Quote@storedtech.com

Here is the quote you requested.

Qty	Description	Unit Price	Ext. Price
	Garden Cameras		
	Cameras		
1	CD42 Outdoor Dome Camera - 30 Day Retention -256 GB Storage - 5MP - 128 Degree Field of View - 15M IR Range	$935.22	$935.22
11	5MP Outdoor Bullet Camera - Zoom Lens - 30-Day Retention	$1,091.22	$12,003.42
	Camera Licenses - Options		
12	Verkada 1-Year Camera License (Optional)	$167.16	$2,005.92
12	3-Year Camera License (Optional)	$395.28	$4,743.36
12	5-Year License (Optional - SELECTED)	$647.28	$7,767.36
12	10-Year Camera License (Optional)	$1,295.28	$15,543.36
	Networking Hardware		
5	Ubiquiti NanoBeam AC Gen2 NBE-5AC-GEN2 IEEE 802.11ac 450 Mbit/s Wireless Bridge - 5 GHz - 9.3 Mile Maximum Outdoor Range - 1 x Network (RJ-45) - Ethernet, Fast Ethernet, Gigabit Ethernet	$215.00	$1,075.00
4	Antenna Mount	$35.57	$142.28
3	7x14x6 Vented Polycarbonate + ABS Weatherproof NEMA Enclosure with Cooling Fan, 120 VAC Outlets & Power Cord	$387.49	$1,162.47
1	Cisco Business 250 Series 10 Port Switch - Switch - L3 - smart - 8 x 10/100/1000 (PoE+) + 2 x combo SFP - rack-mountable - PoE+ (120 W)	$307.85	$307.85
1	Cisco Business 250 Series 48-Port Switch - Switch - L3 - smart - 48 x 10/100/1000 (PoE+) + 4 x Gigabit SFP - rack-mountable - PoE+ (195 W)	$926.39	$926.39

** Balance of total due upon delivery of hardware/software to client site.

![STOREDTECH]

Switching hardware is highly constrained. Estimated to ship from vendor in 273 days, but ETA may vary.

Cabling

Qty	Description	Unit Price	Ext. Price
17	Cat6 single outdoor drop. Price includes cable, terminations, and labor.	$205.00	$3,485.00

Professional Services

Qty	Description	Unit Price	Ext. Price
1	Storedtech Professional Services	$9,100.00	$9,100.00

Scope of Work

Objective:
Deploy Camera system as needed.

Customer Responsibilities:
Client will be responsible for allowing StoredTech access to any onsite locations necessary.
Client will work with StoredTech to allow a window for downtown to perform the upgrade (if required).
Client is reponsible for providing a man-lift for all pole locations that require a height in excess of 14 ft.
Client will cut/trim trees as needed for point-to-point line of sight.
Client will trench between buildings as needed.
Assumptions:
Items that are determined to be outside of this Scope of Work will require a Project Change Order.

Notes:
Starting point is office on the right as you turn into property. Office already has cameras deployed.
Design assumes power can be provided by client for each location.
All Cabling will be custom made Outdoor CAT6 patch cables as needed at sites A,B & C. Patch cables will not be used.
Depending on pole type, Ubiquiti PTP system can be either screwed to a wood pole or strapped to a metal one.

Project Management Engagement

- Intro Call with Project Lead and SOW Review
- Assigned Project Manager with ongoing oversight
- Remote Meetings (Project Manager & Engineer)
- Close Out Call upon completion
- Project Survey sent upon completion
- Approximately 4 hours of PM services.

Qty	Description	Unit Price	Ext. Price

Acquire the technology you need today! Leasing options may be available for any quotes greater than $5,000. Please contact your Sales representative if you would like more information.

SubTotal	$36,904.99
Tax	$2,583.35
Shipping	$450.00
Total	**$39,938.34**

Deposit Required: $29,953.76
Monthly Total: $0.00

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100 Great Oaks, Suite 116
Albany, NY 12203
United States
t. 518-793-1111   f. 518-670-0120

Sold To

Sanford Housing Authority
Shannon Judd
1000 Carthage St.
Sanford, NC 27330
United States

Phone   919-776-7655
Fax

Your Sales Rep

Bill Craver
Director of Strategic Accounts
(518) 502-2728
quote@storedtech.com

Here is the quote you requested.

Qty	Description	Unit Price	Ext. Price
	226 Linden Ave. Cameras		
3	CD42 Outdoor Dome Camera - 30 Day Retention -256 GB Storage - 5MP - 128 Degree Field of View - 15M IR Range	$935.22	$2,805.66
3	Arm Mount Kit	$69.42	$208.26
3	Verkada Pendant Cap Mount	$53.82	$161.46
	Camera Licenses - Options		
3	Verkada 1-Year Camera License (Optional)	$167.16	$501.48
3	3-Year Camera License (Optional - SELECTED)	$395.28	$1,185.84
3	5-Year License (Optional)	$647.28	$1,941.84
3	10-Year Camera License (Optional)	$1,295.28	$3,885.84
	Networking Hardware		
	Networking hardware is highly constrained. Estimated delivery based on availability. Switches have an ETA of 273 days.		
1	Cisco Business 250 Series 10 Port Switch - Switch - L3 - smart - 8 x 10/100/1000 (PoE+) + 2 x combo SFP - rack-mountable - PoE+ (120 W)	$306.14	$306.14
1	UPS Smart 1500VA Tower Battery Back Up - Rackmount - 900W	$372.79	$372.79
1	4U Vertical Wall Mount Rack	$74.48	$74.48

** Balance of total due upon delivery of hardware/software to client site.

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Qty	Description	Unit Price	Ext. Price
	Cabling		
3	Cat6 single outdoor drop. Price includes cable, terminations, and labor.	$205.00	$615.00
	Professional Services		
1	Storedtech Professional Services	$2,080.00	$2,080.00

Scope of Work

Objective:
Install and deploy cameras at client's 226 Linden Ave. location.

Notes:
Client will provide internet services and a mounting loation for all networking equipment to run cameras.
Client will provide power where needed.

Payment Terms/Milestone Billing

Client shall pay a 100% down payment of the equipment amount upon signing of quote. After which Client will make payments for professional services that shall be made on a milestone basis (each payment milestone being a "Payment Milestone"). These payments represent the total charges to be paid by the Client to StoredTech for performance in accordance with the project.

The Client agrees to the following Payment Milestones in a timely matter (30 days from milestone completion).

- Payment Milestone 1: Pre-Staging - 25% of professional services amount upon completion of equipment configuration prior to delivery.

- Payment Milestone 2: Implementation - 65% of professional services amount upon completion of project execution and equipment delivery on-site.

- Payment Milestone 3: Client Sign-Off - 10% of professional services amount upon project closeout.

Project Management Engagement

- Intro Call with Project Lead and SOW Review
- Assigned Project Manager with ongoing oversight
- Remote Meetings (Project Manager & Engineer)
- Close Out Call upon completion
- Project Survey sent upon completion
- Approximately 4 hours of PM services.

Acquire the technology you need today! Leasing options may be available for any quotes greater than $5,000. Please contact your Sales representative if you would like more information.

SubTotal		$7,809.63
Tax		$546.67
Shipping		$147.29
Total		**$8,503.59**

Deposit Required:	$5,745.64
Monthly Total:	$0.00

** Balance of total due upon delivery of hardware/software to client site.

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100 Great Oaks, Suite 116
Albany, NY 12203
United States
t. 518-793-1111   f. 518-670-0120

Sold To

Sanford Housing Authority
Shannon Judd
1000 Carthage St.
Sanford, NC 27330
United States

Phone   919-776-7655
Fax

Your Sales Rep

Bill Craver
Director of Strategic Accounts
(518) 502-2728
quote@storedtech.com

Here is the quote you requested.

Qty	Description	Unit Price	Ext. Price
	Gilmore Cameras - The Community		
	Cameras		
1	CD42 Outdoor Dome Camera - 30 Day Retention -256 GB Storage - 5MP - 128 Degree Field of View - 15M IR Range	$935.22	$935.22
8	5MP Outdoor Bullet Camera - Zoom Lens - 30-Day Retention	$1,091.22	$8,729.76
1	Verkada CB51-TE Outdoor Bullet Camera - 5 MP - Telephone Lens - 30 Days Retention	$1,169.22	$1,169.22
4	Pole Mount	$163.02	$652.08
	Camera Licenses - Options		
10	Verkada 1-Year Camera License (Optional)	$167.16	$1,671.60
10	3-Year Camera License (Optional - SELECTED)	$395.28	$3,952.80
10	5-Year License (Optional)	$647.28	$6,472.80
10	10-Year Camera License (Optional)	$1,295.28	$12,952.80
	Networking Hardware		
4	Ubiquiti NanoBeam AC Gen2 NBE-5AC-GEN2 IEEE 802.11ac 450 Mbit/s Wireless Bridge - 5 GHz - 9.3 Mile Maximum Outdoor Range - 1 x Network (RJ-45) - Ethernet, Fast Ethernet, Gigabit Ethernet	$215.00	$860.00

Hardware is highly constrained. Vendor estimates availability of hardware is 5-6 weeks, but ETA may vary.

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Qty	Description	Unit Price	Ext. Price
2	Antenna Mount	$35.57	$71.14
2	7x14x6 Vented Polycarbonate + ABS Weatherproof NEMA Enclosure with Cooling Fan, 120 VAC Outlets & Power Cord	$437.23	$874.46
	Estimated to ship fropm vendor in 3-4 weeks, but ETA may vary.		
4	Cisco Business 250 Series 10 Port Switch - Switch - L3 - smart - 8 x 10/100/1000 (PoE+) + 2 x combo SFP - rack-mountable - PoE+ (120 W)	$341.08	$1,364.32
	Cabling		
14	Cat6 single outdoor drop. Price includes cable, terminations, and labor.	$205.00	$2,870.00
	Professional Services		
1	Storedtech Professional Services	$7,800.00	$7,800.00

Scope of Work

Objective:
Deploy Camera system as needed.

Customer Responsibilities:
Client will be responsible for allowing StoredTech access to any onsite locations necessary.
Client will work with StoredTech to allow a window for downtown to perform the upgrade (if required).
Client is reponsible for providing a manlift for all pole locations that require a height in access of 14 ft.
Client is resonsible for providing conduit between designated locations.

Assumptions:
Items that are determined to be outside of this Scope of Work will require a Project Change Order.

Notes:
Starting point on corner of Church and James Street will need CAT6 ran from existing building. There is a current camera setup on an existing pole that has conduit from the main building. Cabling in conduit can be removed and a new run installed as needed for networking.
Design assumes power can be provided by client for each location.
All cabling will be custum made Outdoor CAT6 patch cables as needed at sites C & D. Patch cables will not be used.
Depending on pole type, Cameras & Ubiquiti PTP system can be either screwed to a wood pole or strapped to a metal one.

Project Management Engagement

- Intro Call with Project Lead and SOW Review
- Assigned Project Manager with ongoing oversight
- Remote Meetings (Project Manager & Engineer)
- Close Out Call upon completion
- Project Survey sent upon completion
- Approximately 4 hours of PM services.

Qty	Description	Unit Price	Ext. Price

	SubTotal	$29,279.00

Acquire the technology you need today! Leasing options may be available for any quotes greater than $5,000. Please contact your Sales representative if you would like more information.

SubTotal	$29,279.00
Tax	$2,049.53
Shipping	$450.00
Total	**$31,778.53**

Deposit Required:	$21,929.00
Monthly Total:	$0.00

STOREDTECH

Call Center for Maintenance Afterhours and Weekend

Request for Proposals

Answering Services

From
Gilson Call Center for Maintenance Services
(GCCM)

to the
Sanford Housing Authority
(SHA)

January 2, 2025

Victoria Park Centre
1401 East Broward Boulevard * Suite 101 * Fort Lauderdale, FL 33301
Phone (888) 252-2338 * Fax (954) 206-0301* Cell (954) 292-2596
Email: matt@gilsonsoftware.com * www.gilsonsoftware.com

Table of Contents

Dr. Michael C. Threatt
CEO
Sanford Housing Authority
317 Chatham Street
Sanford, NC 27331

Michael:

Thank you for allowing Gilson Call Center Services (GCCS) an opportunity to provide you with our proposal for our *Gilson Call Center for Maintenance (GCCM) Service* in response to your request. It is always a pleasure when one of our Client Housing Authorities Executive Director/CEO moves to another Housing Authority and requests our Services. This confirms that we have met their Service needs.

It is my believe that we can provide you additional Services at the Sanford Housing Authority that we were not able to provide at Dothan at a very reasonable rate. We started with Dothan HA with both the Reception and Maintenance Call Centers but then the Reception Call Center was dropped.

The reason was because the DHA Team wanted us to perform a Call Transfer which ends up being more expensive. At SHA, I would recommend having our qualified CSR's handle the complete call thus providing the SHA Team time to perform other tasks and this Service is at a lower cost.

Our Maintenance Call Center Services are in a unique position to support all SHA programs because we provide low-income callers with experienced CSR's that understand their needs. We provide callers with a superior customer service experience with our omni-channel call center which we over staff to ensure that all callers have their calls answered by a live empathetic culturally competent Customer Service Representative (CSR) rapidly.

We have developed our Gilson Call Center System that provides the callers with a variety of self-service options. This includes the ability to receive helpful information via text, emails, videos, links to our Web Work Order System and Residents can utilize our iResident Services App, if desired or applicable.

Our recent version of our Maintenance Call Center System has been integrated with our *"New Artificial Intelligence (AI)" Programs*. The AI programs review the database specifically for information related to past calls from a resident and provide the CSR with important information that not only makes them more efficient. As an example, it provides the CSR with information related to the unit and resident so if the resident is elderly the CSR can handle the call appropriately.

Please review the video link below to obtain a quick overview of our Call Center for Maintenance Service

https://youtu.be/NxBNDqLe7b8

We can provide the SHA with the following options for approximately 449 units. Our Call Center for Maintenance Service is priced on a Fixed Price based on the number of units for all Housing Authorities and

this includes all inbound, outbound, patched calls, data entry and close out (if applicable) in the SHA Work Order System, email notifications, and/or text messages notifications and *iResident Services App* and Web Work Order System (including Training Residents).

We would like to highlight a few services and features that we have recently or in the process of enhancing to make our Service better and why SHA should continue the Partnership with Gilson Housing Partners.

1. **Enhanced IVR Process & iResident Services App:** Our Interactive Voice Process including our *"New Artificial Intelligence (AI)" Programs* is enhanced because we have programmed the IVR functions to integrate from our phone system to our Call Center and Web PHA Partner System. This provides us the ability to:
   a) Receive a call from a resident and read their phone number and automatically retrieve all their information and display for the CSR when answering the call including the last 4 calls received from the resident.
   b) Provide integrated selection from voice prompts by the resident that then provides the CSR informative information assisting them in facilitating the call such as 1.) number of bedrooms and bathrooms, 2.) if the resident is elderly or handicapped, 3.) if there is a pet in the unit to notify the on-call staff, and 4.) much more information.
   c) Automatically Email or Text the resident desired information or required based on IVR prompts

   Last month, our new version of the iResident Services App includes the *Geo Tracking function* for the Residents to be able to track the location of the On-Call Staff after they commenced the work order process for the resident. Until that point the Resident views that their work order has yet to be started.

2. **HA Video Production:** A new feature we are providing Clients is the production of video's related to the Services that we are providing. Most of these videos are:
   a) Explaining functions to assist the On-call staff such as "How to turn off the water off for a sink or toilet"
   b) Instructions about how to navigate or download the iResident Services App and/or "How to create a Work Order in the iResident Services App. Example: Please review this video:

   https://youtu.be/ERenFo8F-jg

3. **Call Center Data Analyst:** We recently added a 2 data analysts to our Call Center Division. These positions include one from Reception and the other for the Maintenance Call Center. The responsibilities of these analysts are to provide our Clients with informative data related to the calls and activities that are being processed and sending detailed and summary reports to our HA Clients. We are currently working on a pilot project with the Oakland Housing Authority and Housing Authority of the City of Los Angeles. We would be please to add SHA if your Maintenance Management is interested.

   These reports will include a variety of KPI's based on the requirements of our HA Clients. This will include basic information like the number of calls, type of calls, wait times, hold times, handle time and abandoned calls. However, this will included more important information related how long it takes a HA Staff or CSR to follow-up on requests, % of types or requests and much more. This enhanced service will be at no additional cost to our HA Clients.

4. *Call Center System*
   We are excited that we are launching our *Call Center & Phone System* to the Housing Authority market.

These products have been developed for our internal use and we determined that since we designed specifically to utilize for our Housing Authority Clients these products would be able to increase the efficiency and productivity of these Clients.

5. **VOIP Phone System:** We would be pleased to provide a separate proposal on the ability of purchasing our VOIP Phone System that also includes group messaging and video conference. This system is like having a Housing Authority Cloud phone system with "Zoom" and "Slack" all put together with specific functions designed for Housing Authorities.

We perform our Call Center Service for only Housing Authorities and currently Service over 145 Housing Authorities from 100 units to over 9,500 units and from Miami to the District of Columbia, Huntsville, Al to Dallas and El Paso, Texas, to Los Angeles, Ca. We perform our Call Center Service for Clients that have 4 to 5 calls a day to Dallas, Houston and Los Angeles that can reach over 1,000 calls per day.

Our service handles approximately 5,500 calls per day and this volume is about the same for any day of the week (Except Monday's when the volume is higher after the weekend) since we have Clients that utilize different services either 24/7, After Hours and Weekends Only, Weekday Only, etc.

Due to our continued improvement process, we continue to increase our efficiency for our Housing Authority Clients from June thru December, our Call Center Service has resulted in an average handle time per call of 2 minutes and 7 seconds with an average wait time is 48 seconds.

Since we originally started as a Software Company, *we were able to develop an excellent Call Center System.* We perform a unique service since we can enhance our Call Center System via our Software Division to accommodate operating idiosyncrasies from our HA Clients. This enables us to assist our Customer Service Representative (CSR) with productivity software enhancements in handling Maintenance calls.

We are the *Only Call Center that specializes in call center functions for Housing Authorities* including our Gilson Call Center (GCCM) for Maintenance, NSPIRE/HQS Inspection Call Center for NSPIRE/HQS inspection scheduling, Reception Call Center to answer all calls for a Housing Authority as it relates to waitlists, re-certification questions and interview scheduling and many more that are listed this proposal.

All our CSR's are bi-lingual in English & Spanish and we have some CSR's on our overnight and weekend shifts that also speak Creole which is required in our hiring process. The CSR's are trained and then retrained annually related to

Our goal is to exceed your expectations and we will continue to attempt to do this every day. We are confident that we will attain this goal and are hopeful that you will provide us the opportunity to develop a partnership with your organization.

Gilson Software Solutions-PHA, LLC d/b/a as Gilson Call Center Services, a Division of Gilson Housing Partners (GHP) has a business license to perform business in the City of Fort Lauderdale, Broward County and State of Florida. Matt Gilson has 100% ownership of the firm which currently employes over 250 employees and 1099 Contractors including over 150 within our Call Center Division. This proposal is valid for not less than 180 days from the date of the submittal.

Matt Gilson will be the primary contact and if you have any questions regarding this proposal, please do not hesitate to call me at (888) 252-2338 x-100, (954) 292-2596 or e-mail me at matt@gilsonsoftware.com.

Best Regards,

Matt Gilson
President

Relevant Experience and Past Performance

Executive Summary

Gilson Software and Call Center Services has been dedicated to developing software products and services that utilize the latest technology for the affordable housing markets for over 29 years. The Gilson Software and Call Center management team prides itself in forming partnerships with its clients and other vendors to develop the kind of solution and service that is able to re-invent their operations and make them more efficient and effective and comply with regulatory requirements.

Gilson Software provides software for two different Affordable Housing markets including Housing Authorities (HA) and Affordable Housing Owners and Agents (O/A). We supply these markets with our PHA Partner and Property Partner Enterprise-wide Software Systems.

Gilson Call Center Services provides Call Center Services to three different markets including Housing Authorities (HA), Public Works Agencies (PWA) and Municipal Health Clinics.

Our Call Center for Maintenance Service is priced on a Fixed Price based on the number of units for all Housing Authorities and this includes all inbound, outbound, patched calls, data entry and close out (if applicable) in HA Work Order System, email notifications, and/or text messages notifications and *iResident Services App* and Web Work Order System (including Training Residents).
The iResident Services App was recently launched and we are currently implementing it at all or our Housing Authorities. Finally, to reduce costs more and increase the resident's efficiency, we are working with Three (3) Lock Companies, and are adding Mobile Key Access in the app like in Hotels in 2023.

iResident Services App Function

https://youtu.be/eGb6c8E02PY

We perform a unique service since we specialize in Housing Authorities (Currently perform the Call Center for Maintenance Service for over 150 HA's) and because we enhance our Call Center System to accommodate operating idiosyncrasies from our clients.

As a result, we provide our Housing Authorities with multiple service options. Many of our HA Clients commence the service with us in a similar manner via a proposal requesting our GCCM Service only. Over 70% increase their services with us over time.

We are extremely interested in a Partnership with SHA and as part of this Proposal, *we will increase the Services to SHA.* We will provide the following Services at *NO ADDITIONAL COST:(Please note that these are options provided to SHA; however, none of these options need to be exercised since they are not included in the Scope of this RFP.)*

1. *iResident Services App* for Residents to enter work orders and check on the status of work orders. The best feature associated with the App is that the residents can view on the App the location of the maintenance staff as they are on the way to the unit.

Many of our clients are utilizing this system to assist residents in streamlining the process and providing them with an easy format.

2. *Web Work Order System-* for Residents to enter work order and check on the status of work orders. Many of our clients are utilizing this system to assist residents in streamlining the process and providing them an easy format, especially for hearing-impaired residents.

3. *Maintenance Operational Analysis* We are forming three Housing Authority Task Forces to include three Housing Authorities in each task force. With the three Affordable Housing staff, we will analyze the data with the goal of improving the efficiency of the Maintenance Department and optimizing the staff per shift.

4. *Resident Text-* We enhanced our Call Center System to text the residents for all work orders with the work order number. We can turn this function on or off based on a client's request. We can also only send based on a resident's request and not for all calls. The text can be modified based on SHA's request. We also have the capability of:

    1. Follow-up Text from iWork Order App that Maintenance Staff is on their way to the unit
    2. Follow-Up text from iWork order App that the job has been completed with the job completion notes.
    3. If desired, include in the Text at the bottom a listing of any open Work Order Jobs

5. *Text Blast and Update On-Call Schedule-*We will provide access to SHA Maintenance Staff to our new GCCM Call Center System which will provide the ability to update the On- Call Schedule by Property and to send a Text Blast to all residents that we have collected their cell phone numbers. The text blast could be utilized when there is a power outage, the water is shutdown, a snowstorm or other building or project maintenance situations. SHA and the Dallas Housing Authority utilize these functions extensively.

Additional Services at an Additional Cost:
1. *Work Order Data Entry-* We can provide our GMCC Data Entry Service at which includes data entry information into the SHA Work Order System. Most of our HA Clients commence our Services without this Service but add it prior to completion of our contract. The cost of this Service is included in the Pricing Chart.

2. *Work Order Close Out-* We can provide our GMCC Close-out Service at which includes data entry and close out information into the SHA Work Order System.

The cost of this Service is included in the Pricing Chart. This would require the SHA maintenance staff to utilize our *i*Work Order App on their Smart Phones or tablets at No Additional Cost including Training.

By utilizing the App will make SHA Maintenance Staff more efficient. The *i*Work Order App completely automates the work order process from receiving work orders, scheduling the work

orders, completing the work orders with notes, taking pictures of damages and automatically invoicing tenants for damage, all done on a wireless phone or handheld device.

3. ***Inspection Finding Work Orders*** – If SHA Management is interested our GMCC Service will enter all Inspection work orders into the SHA Work Order System. We will perform this Service for no additional cost, if SHA utilizes our iUPCS Inspection App (However, the App and Training will be at a cost).

We continue to improve our Services including the following:
1. We perform Customer Service Representative (CSR) training monthly to all CSR's related to Maintenance Operations and Customer Service Protocols.
2. We have implemented a Quality Control Department that:
   a. Reviews work orders that are entered into our Gilson Call Center System for accuracy and quality of content,
   b. Compare work orders between our GCCM System and the Clients Work Order system to ensure accuracy.
   c. Review a sample of recordings for each Client and for each CSR to ensure that residents are receiving a high level of customer service and the CSR is being polite to the residents in all situations.
3. Increased our staffing levels to ensure that over 90% of our calls are answered in less than 20 seconds or 2-3 rings.
4. We added the ability to have our Clients provide us with Questions per Job that the CSR's are required to answer in the Job Notes to make it most efficient for the Maintenance Staff.
5. We added to our GCCM Services at no additional cost the ability to retrieve all SHA call recordings via a secure ShareFile system with the ability to download if needed.

We market all of our products and services independently to our markets through the integration to any other HA or O/A Software Vendor. Many of our clients utilize other Software Vendors products and we integrate our software solutions to these products based on the vendors desire to integrate. We have accomplished this by developing a File Repository Service that reads PIC/TRACS/TIC files and/or a specific designated Excel Spreadsheet from these third-party software products and uploading to our products thus keeping all systems in synchronization. We also provide many Web Service programs that provide and extract data from/to these systems thru the use of staging tables.

Software Operations: In 2008, Matt started Gilson Software and purchased a small Public Housing software firm with a DOS based software package and 80 housing authority clients. In less than two years Matt developed a technical and customer support team and developed PHA Partner, which is a Window Based System. Due to the competition in this marketplace Matt developed a strategy to specialize in Mobile and Voice Technologies and to become the most innovative software firm in the marketplace.

The first step was to develop a technical staff with these skills and during this time developed the first Mobile HQS inspection software utilizing Windows Mobile. The team moved forward with Mobile Work Order and launched these products within a few existing clients. During this development process it was determined that a better platform for these products would be on an iPhone and iPad and thus the direction was changed and within 6 months completed these enhancements. At the same time the Team developed Interactive Voice Response system and enhanced all the mobile systems to include voice recognition.

Since our first Mobile software solution over 15 years ago, Gilson Software has become the first and only software vendor to market our products to Housing Authorities utilizing of vendors Housing Management Software. We have been able to do this because we have built a program that updates our PHA Partner System with the PIC files and/or a specific designated Excel Spreadsheet from either the HA's Housing Management System or directly from the PIC system. Additionally, we have an established a set of staging tables that we send and retrieve data from other HA's Systems. As a result, of this capability our sales effort increased four times and we normally add a new HA to our client portfolio every month.

Finally, as we became specialists in Mobile and Voice systems and Services it became apparent that Housing Authorities also needed assistance with other services.

Gilson Call Center for Residents: Gilson Software was also the first Affordable Housing software vendor to develop iWork Order an App to eliminate paper and make Housing Authority maintenance operations more efficient. The iWork Order App that was developed over 15 years ago has been installed at over 30 Housing Authorities. At the same time, we also developed an Interactive Voice Response (IVR) application that would provide the capability for tenants to call a specific number and via a voice attendant create work orders that can be created and synchronized to the iWork Order App.

During these installations a general theme continued to come up from Housing Authority staff 1.) They wanted to have their tenants talk to a live person, 2.) They wanted to reduce the amount of time performing data entry into their systems thus improving their productivity and 3.) Their current answering service did not understand the Affordable Housing business and handled many other businesses and they could not provide the quality that they desire.

As a result, the Gilson Software-Property Management Answering Service was formed to ensure that this service could be accomplished, and the above goals could be met.

Since the inception of the service, we have added over 150 Housing Authorities as clients and add at least one additional Housing Authority per month to this service.

Inspection Division Services: Our approach is to provide a unique and effective operation by operating the Scheduling and Reporting (Back Office) functions by our Inspections Division. We determined that through the utilization and combination of the Gilson Software voice and inspection software products, the utilization of the skills of our Property Management Answering Service Staff, we could develop the most qualified inspection service.

As the result of the development of this service, we continue to improve both the iHQS Inspection App and SHA Partner Inspection Scheduling module thus improving the service to our client but also their Landlord, Resident and Service Provider.

Finally, as we continued to become specialist in Call Center functions for Housing Authorities it became apparent that Housing Authorities also needed assistance with other services.

Reception Call Center:
Some of our Property Management Answering Service for Maintenance clients realized immediately that we performed high quality work and we started to obtain requests to perform Answering Services for other functions such as Wait List Purge, launching of an Application Cycle, and Inspection and

Recertification calendar services.

As a result, we commenced our Reception Call Center, which continues to evolve by adding more and more services every day including but not limited to:

➤ Applicants, Tenants or other HA Clients are assisted by highly knowledgeable, bi-lingual Call Center staff members who are able to give proper instructions based on HA provided information.
➤ Call Center Operators provide applicants with updated Wait List status information, plus information related to the HA's programs and/or Properties.
➤ Tenants are provided with information related to their re-certifications or inspections, can change their interview or inspection dates and obtain information related to their rental or account balances.
➤ The iReception Software automatically emails HA Staff of changes made by the Call Center staff based on applicant and tenant assignments.
➤ HA Staff notifies Call Center staff of times when they are busy or "Do Not Disturb Time" and Call Center staff will take recorded voice mails and email to HA Staff phone.
➤ We now include as an option to this service the capability of adding our iReception Software App installed on Kiosks in the HA Lobby and provided on the HA Web Site to streamline the process and provide Applicants, Tenants and Other HA Clients with 24/7 access to information.

Over the past five years we have created a niche market of not replacing a Housing Authority operations as other vendors perform but act as a partner to improve their service to their clients and reduce their cost in this ever-changing market.

Re-Exam Processing:
Finally, as the result of changes due to the COVID Pandemic our Affordable Housing Clients required and requested assistance with their Re-examination Processing. As a result, our Re-examination Processing Service was created and we are performing this function for all affordable housing programs including but not limited to Public Housing, Section 8 Vouchers, Project Based Vouchers, Tax Credits, and more. Our process starts with the planning of re-exams to be processed to the completion that includes submission of the PIC files including the following tasks:

➤ Plan for Rex-exams to be completed in the next 120 days
➤ Send letters & Emails to all Reexam participants with 90 to 120 days
➤ Verbally communicate with all Re-exam participants within 90 to 120 days
➤ Counsel with Re-exam participants about:
  o Determine if they are technically challenged, if not assist in downloading the iRe-Exam App and if they are challenged work with them in producing the forms & mailing
  o Changes for their households including additions, employment changes, medical issues, etc
  o Review information that needs to be submitted
  o Method of processing (Web, Kiosk, Paper, etc)
➤ At time of receipt perform review and perform missing document review
➤ Calculate re-examination changes and send appropriate documents to participant
➤ Update Affordable Housing Software and obtain approval from Affordable Housing
➤ Submit PIC File, if included in our functions

Maintenance Services:

Finally, during 2019, we were requested by one of our Housing Authority Clients, if we could assist them with their After-Hours Maintenance Services. They believed that since we were already performing the 24/7 Maintenance Call Center and they were utilizing our iWork Order App it was the next logical step.

They were correct and as a result, we launched Gilson Maintenance Services performing the following two Maintenance Services:

1. After Hours Maintenance Service
2. Make Ready Maintenance Service

We have integrated our three services to optimize the efficiency to the Housing Authority by:

After-Hours Maintenance Service:

a. When our CSR receives a resident call, they communicate the information if an emergency with the Gilson Maintenance staff and the information is sent to the On-Call Staffs iWork Order App,
b. The App provides directions, records all information related to the work order including time, inventory, and pictures
c. The information from the App is submitted back to the CSR and they then close-out the work order in the HA System
d. On a weekly basis, the Gilson Staff provides SHA Management with After Hours Maintenance statistics such as number of work orders, average time, cost, savings, etc

Make Ready – Unit Turn

i. When we receive a request from the HA to Make Ready a unit the Maintenance Supervisor completes an Inspection of the unit utilizing the iNSPIRE Inspection App using the Make Ready Inspection Template
ii. From the App, we submit a "Take Off" Sheet with estimated time and cost and estimated date the unit will be available for move-in.
iii. From the Inspection App, it creates the appropriate work orders in the iWork Order App which the maintenance staff completes to record the work order including time, inventory, and pictures
iv. The information from the App is submitted back to the CSR and they then close-out the work order in the HA System
v. On a weekly basis, the Gilson Staff provides SHA Management with Make Ready Maintenance statistics such as unit turn time, number of work orders, average time, cost, savings, etc

We continue to improve our Maintenance Service and now provide quality maintenance work and numerous analytical tools to improve the HA's efficiency. We perform the following functions prior to commencing work with an HA Client to ensure that quality maintenance is performed:

ii. Gilson Maintenance Director interviews numerous local subcontractors prior to hiring to ensure quality work
iii. Maintenance Director review subcontractors prior work before initiating a subcontract
iv. Maintenance Director provides subcontractor coaching and training during on-site visits
v. Maintenance Director performs QC reviews of work performed in SHA unit

Client Information

Large Housing Authority References:

Housing Authority of the City of Los Angeles
2600 Wilshire Boulevard, 4th Floor
Los Angeles, CA 90057
Contact: Mr. Mark Sanford ,Public Housing Director
Mark.Sanford@hacla.org
Services Provided: PMCC-After Hours Only w/ Data Entry into Yardi

Dallas Housing Authority
3939 N Hampton Rd
Dallas, Texas 75212
Contact: Ms, Shannon Bramlet, Public Housing Director
Shannon.Bramlet@CNHAntx.com
Services Provided: Property Management Call Center-After Hours Only w/ Data Entry & Reception Call Center Services

Housing Authority of the City of El Paso
5300 E. Paisano Dr.
El Paso, Texas,79905
Contact: Ms. Jody Levy EP Housing Operations and Management Enterprises, PFC
jody.levy@envolvellc.com
Services Provided: Property Management Call Center-24/7 with Data Entry into Yardi

Metropolitan Development and Housing Authority *(Nashville)*
712 South Sixth Street
Nashville, Tennessee 372062
Contact: Rita James, Purchasing Agent - (615) 252-8432
rjames@Nashville-CNHA.org
Services Provided: Call Center Services After Hours, Weekends and Holidays Only

District of Columbia Housing Authority
300 7th Street SW, Washington, D.C. 20024
Contact Name: Anton Shaw, Director
Services provided: Call Center Services with Data Entry into Yardi

Wilmington Housing Authority
400 N. Walnut Street Wilmington, DE 19801
Contact Name: Sandra Rosmini- Housing Management Chief - srosmini@whadelaware.org
Services Provided: Call Center Services 24/7 with Data Entry into Yardi & Reception Call Center

Housing Authority of the Birmingham District
1826 Third Avenue South, Birmingham, Al 335233
Mr. Larry Williams, Procurement Officer
Services Provided: Reception Services and Call Center Services After Hours.

Housing Opportunity Commission of Montgomery
10400 Detrick Avenue, Kensington MD 20895
Contact Name: Lynn Hayes, Procurement Officer
Services Provided: Inspections

Other Housing Authority Clients:
Clients Implemented in Fourth Quarter 2019:
New Haven Housing Authority (Maintenance – After Hours)
Housing Authority of the County of Santa Barbara
(Maintenance & Reception Services)
South Bend Housing Authority (Maintenance & Reception Services)
City of Tampa Public Works
Lorain Metropolitan Housing Authority
Winn Residential Corp
Envolve Communities
Metropolitan Development and Housing Agency (Nashville)

Clients Implemented in 1st Quarter 2020:
Dallas Housing Authority
Housing Authority of the City of Beaumont
Peoria Housing Authority
Chattanooga Housing Authority

Clients Implemented in 2nd Quarter 2020:
East Chicago Housing Authority
Central Falls Housing Authority
College Park Housing Authority (Reception Call Center)

Clients Implemented in 3rd Quarter 2020:
H2 Hospitalist Medical Center
Ruston Housing Authority (Reception Services)
Chattanooga Housing Authority
Peoria Housing Authority
Yolo Housing Authority

Clients Implemented in 4th Quarter 2020:
Sacramento Housing and Redevelopment Agency (Reception Services)
Allentown Housing Authority (Vaccine Management Service)
New Haven Housing Authority (Maintenance – 24/7)
Oakland Housing Authority (Reception Services)

Beaumont Housing Authority
Birmingham Housing Authority
Ruston Housing Authority (iReception)
Saratoga County Mental Health (Medical)

Clients Implemented in 2nd Quarter 2021:
District of Columbia Housing Authority-(Maintenance Call Center)
District of Columbia Housing Authority-(Reception Call Center)
St. Petersburg Housing Authority (Maintenance Services)
City of Omaha Public Works Department

Clients Implemented in 3rd Quarter 2021:
Leominster Housing Authority (Inspection Services)
Burlington Housing Authority (Reception and Maintenance Call Center)
South Bend Housing Authority (Inspection Services)
Minneapolis Housing Authority

Clients Implemented in 4th Quarter 2021:
Michigan City Housing Authority
Cincinnati Metropolitan Housing Authority (Maintenance Call Center)
Cincinnati Metropolitan Housing Authority (Reception Call Center)
Cincinnati Metropolitan Housing Authority (Recertification Processing)
Hartford Housing Authority (Inspection Services)
Southern Nevada Regional Housing Authority

Hialeah Housing Authority
75 East 6th Street
Hialeah, FL 33010
Contact: Julio Ponce, Executive Director
Hialeah, FL 33010
jponce@hialeahhousing.org
Services Provided: Software, Inspections and Answering Services

Allentown Housing Authority
1339 W Allen Street
Allentown, PA 18102
Contact: Louis Day
(937) 910-7500
lday@allentownhousing.org
Services Provided: Wait List and Landlord Maintenance, PMCC-24/7, Vaccine Mgmt

Oakland Housing Authority
1180 25th Avenue
Oakland, CA 94601
Contact: Mr. Mark Schiferl, Director of Property Management
mschiferl@OaKCKHA.org
Services Provided: Call Center-24/7 with Data Entry into Yardi System AND Reception Services

Yonkers Housing Authority
1511 Central Park Avenue
Yonkers, NY 10710
Contact: Mr. Carlos Laboy, CIO
claboy@mhacy.org
Services Provided: Work Order Software and PMAS 24/7 Services

Huntsville Housing Authority
200 Washington Street
Huntsville, AL 35804
Contact: Ms. Terica Pope, Director of Housing Operations
(256) 532-5637
tpope@hsvha.org
Services Provided: Property Management Call Center-24/7 with Data Entry

"And Many More"

Sanford Housing Authority

Description – Units ~ 450			Monthly Cost	Annual Cost
Call Center Service for Maintenance Based on SHA Requirements				
After Hours Only Answering Service _Without_ Work Order Entry into Work Order System			*$150.00*	*$1,800*
Discount Option:				
iResident – Sample Discount: With 30% work orders processed via iResident Services and/or Web Work Order a 15% Discount will be applied (S @ 15% or $135.00)				
Other Service Options:				
Answering Service Only After Hours (1) (2) (4)			$250.00	$3,000
24/7 (1) (3) (4) (8) (9)			$300.00	$3,600
Answering Service plus Work Order Entry into Work Order System				
After Hours (1) (3) (4)			$262.50	$3,150
24/7 (2) (3) (4) (8)			$525.00	$6,300
Answering Service plus WO Entry & Closing (5) (6) (7)				
After Hours (1) (3) (5) (6)			$328.13	$3,937.56
24/7 (2) (3) (5) (8)			$656.25	$4,331.28
Answering Service plus WO Entry, Closing & NSPIRE Inspection Findings (5) (6) (7)				
After Hours (1) (3) (5)			$360.94	$4,331.28
24/7 (2) (3) (5) (8)			$721.88	$8,662.56
Set-up Fee (8)				*$250.00*

1. Our pricing is based on the number of units as listed in the GMCC System or number of units of 449

2. The After Hours Service is from 04:30 pm to 07:30 am Monday to Friday or 15 hours, weekends, holidays, and some lunch time and some leave time. Our pricing is fixed based on number of units per Housing Authority.

3. This service includes 24 hours per day seven days per week including holidays.

4. The Work Order Entry Fee is to enter all work orders that are taken during the PMCC Service Hours and enter them into the current Housing Authority Work Order System. The fee would be added to the appropriate service package that is selected.

5. The cost of the TTY and Language interpretation services is $2.50 per minute and is invoiced the following month with a listing of all calls. _We have waived this fee for this Quote._ There is no additional cost for the **Sorenson ntouch®** suite of products.

6. The Work Order Closing Fee is to close all work orders that have either been closed on the iWork Order App or called into the Service Center and updated in SHA Work Order System.

7. The NSPIRE Finding Work Order Creation Fee is to create a work orders that have either been created in the iNSPIRE Inspection App during an Inspection. These Work Orders will be communicated to the Service Center and updated in SHA Work Order System. This also includes unlimited versions of the iNSPIRE App for the maintenance or Inspection staff.

8. There is a fee charged for business analysis, implementation and set-up the answering service system.

Relevant Experience

III. *Gilson Call Center for Maintenance Services (GCCM):*

a. GCCM Information Summary:

As is stated in the Executive Summary, Gilson Software was the first and only Affordable Housing Software Vendor to create a Call Center for Maintenance Services and mainly only for Housing Authorities. We have been adding at least two new Housing Authority Clients per month and we perform the following:

Our Call Center for Maintenance operation is 24/7 and has been for 13 years. We have the capability of adding as many CSR's to the system as possible.

Our service handles approximately 2,500 calls per day and this volume is about the same for any day of the week (Except Monday's when the volume is higher after the weekend) since we have Clients that utilize different services either 24/7, After Hours and Weekends Only, Weekday Only, etc.

We perform our Call Center for Maintenance Service for mainly Housing Authorities and currently Service over 100 Housing Authorities from 100 units to over 9,500 units and from Miami and Hialeah, Fl. To District of Columbia, Birmingham and Huntsville, AL to Los Angeles, Santa Barbara and Oakland, CA. We perform our Call Center Service for Clients that have 4 to 5 calls a day to over 400 per day.

Due to our efficiency, our average handling time per call for our Housing Authority Clients from March to July has been 2 minutes and 17 seconds and the average wait time is 24 seconds including the integration into the Clients Work Order System.

Many of our clients that are After Hours/Weekend Only will roll over their phones at any time of the day due lunches, meetings or because they have to leave the office and we are set-up to handle the overflow.

All of our CSR's are fluent in Spanish, therefore, no translation is necessary. It is a hiring requirement to be bilingual in Spanish and English to work as a Customer Services Representative (CSR's). At the time of hiring, they are tested in both languages. By ensuring that all CSR's are bi-lingual, no calls need to be transferred to another CSR which is more efficient.

Also, if we have a high number of calls of a particular language, we hire a CSR with this proficiency as we did with Creole in the South Florida area with Miami, Hialeah and Palm Beach.

We utilize an interpretation service that provides us an additional 50 languages which we mainly utilize for our West Coast Housing Authorities for different Asian languages. We have included the cost of this service in the cost proposal below. All the Authority has to do is let us know the languages they require and we do the rest.

TOP 50 LANGUAGES
TRANSLATED WORLDWIDE

1.	English	26.	Hindi
2.	Spanish	27.	Czech
3.	Vietnamese	28.	Portuguese (Portugal)
4.	Chinese	29.	Turkish
5.	Russian	30.	Hungarian
6.	Korean	31.	Greek
7.	Japanese	32.	Slovakian
8.	French	33.	Bosnian
9.	Portuguese (Brazil)	34.	Kishwahili
10.	German	35.	Urdu
11.	Arabic	36.	Spanish (Castilian)
12.	Italian	37.	Finnish
13.	Tagalog	38.	Swedish
14.	Hmong	39.	Danish
15.	Cambodian	40.	Samoan
16.	French (Canada)	41.	Hebrew
17.	Farsi	42.	Javanese
18.	Armenian	43.	Somali
19.	Dutch	44.	Croatian
20.	Spanish (Mexico)	45.	Napalese
21.	Lao	46.	Burmese
22.	Haitian Creole	47.	Bengali
23.	Polish	48.	Malay
24.	Punjabi	49.	Mien
25.	Thai	50.	Ukrainian

Contracted with both AT&T Relay Services (http://relayservices.att.com/content/2/tty_relay_2.html) for TTY services for the Housing Authority hearing impaired population.

We also contracted with Sorenson Communications that provides world-class communications products and services that break down communication barriers between deaf, hard-of-hearing, and hearing individuals. Sorenson Communications offers the highest-quality video interpreting service, Sorenson Video Relay Service® (SVRS®), and the Sorenson ntouch® suite of products (ntouch® VP videophone, ntouch® PC, ntouch® for Mac®, ntouch® Tablet, and ntouch® Mobile).All the Authority has to do is let us know how you would like us to market this service to your tenants and we will work with the Authority in doing so.

b. Call Processing:
We have provided a Niche Service to the Housing Authority market and:

When a tenant calls, the system retrieves all their property, unit, and prior work order information from their phone number or by searching their name and/or address thus providing a better customer service experience for the tenant.

When the operator receives the call the On-Call Maintenance staff is displayed for their review and the last four work orders are also displayed to ensure that duplicate work orders are not created.

When the operator is creating the work order they obtain a listing of all Emergency pre-defined jobs and the priority is displayed. For all emergency work orders the system automatically sends a text to the On-Call personnel and prompts the operator to make the phone call.

If the On-Call personnel does not answer, then the system will automatically send to the appropriate

operator a reminder to make follow-up phone calls.

When the operator creates the job/task the system prompts them to ask predefined questions so that they can provide the maintenance staff with appropriate information in the work order job description.

When the work order is created by the operator it is automatically created in the iWork Order system and can be synched to the on-call staff's & supervisor's Android or iPhone to provide additional information, if applicable From the device, additional information can be added including notes, pictures, start and completion time, tenant signature, etc. and the staff can complete the work order.

If the Housing Authority or Property Manager does not utilize the iWork Order App the work orders are printed directly to the appropriate property printer for retrieval.

In our Call Center Operations area we have added two 27" Monitors with the National Weather Service so that we can provide the operators with up to date weather forecast and temperatures and so that the supervisors can better manage staffing levels.

c. Staffing:
Daily, we measure wait times to ensure that we have the appropriate number of CSR's are working the appropriate time shifts. We also utilize our supervisors to pick up overflow calls.

Secondly, we have cross trained our three Department specialty's so that all departments (Reception, Inspection and Maintenance) can take calls for all departments to even the flow of calls.

Finally, we have our "Bull Pen" which are staff that are On-Call in case of an increase in the level of calls due to weather, a major issue at an HA Client (like Power Outage), or CSR's calling our ill.

Our CSR's are trained specifically related to Public Housing Maintenance and Operations and Other Housing Authority programs.

Due to the above efficiencies, our daily review of wait time and changes daily and weekly of our staff, we answer calls within 3 rings with the goal of answering on the first ring.

Our SOP is that calls cannot be placed on Hold by our CSR's unless they are calling an On-Call staff for a clarification.

The GCCS goal is 98% and we do everything possible to exceed this goal. When rating our CSR's the standard is 95% of our measurements which are very strict call criteria for them to meet.

From our QC Survey's and CSR reviews we will provide the SHA Director of Operations with a monthly and quarterly report. The Director can request any specific information they may be interested and we can have our Software Department make the appropriate changes to our reports.

d. CSR Training

We perform both training and coaching at GCCS. At the time a CSR they are provided training and the provide all our CSR's with quarterly customer service, housing management operation and maintenance training and perform daily Quality Control reviews. Any changes in Clients policies and procedures are reviewed during the monthly and quarterly training sessions.

Ms. Marilyn Tomas (Director Client Support) would be the Director that would lead Ismael Sancez CSR-Trainer to perform the training and hiring if necessary and be responsible to communicate implementation status with CMHHOUSING during this process

All of our CSR's have been trained in the use of the All HA Work Order systems including Yardi, Emphasys, MRI, and many more as we perform GCCM Service for many Large Clients

e. Gilson Call Center System (GCCS)

What we have done that is unique is to enhance our iWork Order Software System to integrate into our purchased Answering Service Software System,

i) We Created programs to integrate with all Housing Authority/Property Managers Housing Management Software to provide for uploading of PIC, TRACS and TIC files ensuring that when our operators receive phone calls we would already have all information on the tenants and units. We also store the phone number that the tenant calls in from and link this number to the tenants record so that the next time they call it automatically pulls up their information.

ii) We developed a Web Work Order App that we set-up for every client that specifically makes it easier for handicap residents to enter work orders and check on the status.

iii) Enhanced our iWork Order Software to include On-Call Schedule thus when a work order was entered the system would automatically text On-Call staff and also prompt the operator to make the phone call to the appropriate On-Call staff.

iv) *Then we enhanced this function so that the On-Call Staff can respond that they received the text (Text Back) so the operator does not need to call and bother them, if HA Management decides to implement.*

v) Enhanced the iWork Order system with reminders that auto prompt the operator to call the On- Call staff when they do not answer the phone.

vi) ***Created a "Text Blast" function that allows the operator to send a Text Blast to all residents that we have collected their cell phone numbers. This would occur when there is a power outage, the water is shutdown or other building or project maintenance situations.***

vii) Enhanced the iWork Order system with Job definitions so that the system and the operators know what jobs are emergencies. We also list on the screen the last four work orders created for a tenant/unit so that duplicate work orders are not entered into the system.

viii)   From the jobs we have created a question template so that operators answer the questions that are necessary and will provide maintenance staff with the appropriate information.

f.   GCCS System Set-up

Our Call Center for Maintenance system Property List will include all Properties. The On-Call Schedule is set-up by Property, Time Range and By Trade within the Properties, if applicable/needed. Our system is set-up with a 4-level hierarchy.

During the implementation of our service, we import all the Properties from the SHA System and import into our GCCM System. This includes the AMP information and when setting up the On-Call Schedule in the GCCM system each AMP/Property is assigned the On-Call Staff.

We review all specific scripts, systems and protocols and develop specific SHASOP's. We will provide SHA Standard Operating Procedures for SHA's policies and procedures. We will work with SHA Staff and develop Standard Operating Procedures and will obtain approval prior to Going Live.

Our standard Area and Job/Task list in the GCCM System complies with and follow the SHA Jobs/Tasks as listed in SHA Work Order System and UPCS Standards. As a result, our CSR's are able to retrieve an extensive list of Jobs/Tasks which we match to the SHA Task Codes and the system provides them the guidance to determine if it is an emergency, urgent, routine, inspection, etc. Also, we provide the CSR's the ability to make a Non-Emergency and Emergency if they believe the situation needs an immediate attention. These changes are normally related to situations that occur to elderly or disabled residents.

We will enter jobs/tasks in our GCCS system and when a CSR is entering a work order from a call and selects the job/tasks, the system will identify the call as an emergency, Urgent or Routine Work Order and at the same time they record the information.

SHA also can provide us with additional scripts/questions that they would like our CSR to ask the resident and the CSR will include the answers in the notes for the On-Call maintenance staff. By including this information it provides the maintenance staff very important information related to a specific task. In these questions SHA can identify jobs that they will be charged a fee.

When the CSR selects the emergency job our GCCM System will automatically send to the On-Call staff a text will all information related to the work order. The system also automatically makes the outgoing phone call for the CSR to the On-Call Staff. If the On-Call staff is not available, then the system will remind the CSR to call back the On-Call staff.

We include information related to COVID including if there is any one sick in the household. We also will allow SHA the ability to provide us with a list of Quarantined units so we make sure we do not send anyone to these units.

As part of our training and retraining classes, we provide cultural proficiency training. Based on the diversity of our Housing Authority residents, applicants, and visitors, many are from cross cultural settings and we want to ensure our CSR's are able to handle all calls.

We have a training manager to train all CSR's in proper phone and customer service etiquette, send staff to NAHRO classes and also send our Customer Service Representatives (CSR's) to the Hialeah Housing Authority within the first 6 months for reviews and training.

g. GCCS System Functions:

Our GCCM System automatically reads the phone number from the caller/resident. If they have called prior the system pulls up their record which includes the residents Property and Unit and the last four work orders for that resident. If the caller has not called in the past then the Customer Service Representative (CSR) simply enters the resident name or address and the system will pull up that record. All calls come thru the same number that identifies the call coming from a SHA resident. The system records this phone number for the resident so that either the GCCM Service or SHA can send out Text Blasts to residents related to issues at the property or building level such as no power or any water issues.

Our Gilson Call Center System has been designed specifically for Housing Authority Maintenance Call Centers. During the implementation of our service, we import all the Properties from the SHA System and import into our GCCM System. We describe much more later in this proposal, however; since we also have a Software Department we continue to enhance the system to accommodate all changes to the business.

Our GCCM system Property List will include all Properties. The On-Call Schedule is set-up by Property, Time Range and also By Trade within the Properties, if applicable/needed. Our system is set-up with a 4 level hierarchy as SHA has listed.

If the Maintenance staff need to contact our CSR's we have a Maintenance line for staff to call in and bypass the normal SHA line and reach a supervisor or manager immediately at (888) 251-8876.

The first On-Call staff will be sent a text, email (if desired) and phone call at the time the work order is entered. The above information is included in the text and email or will be provided to the On-Call staff when the CSR contacts them. If the On-Call does not answer, then after (time requested by SHA) xx minutes the CSR will call the On-Call Again. If the On-Call does not answer, then after (time requested by SHA) xx minutes the CSR will call the On-Call a third time. If the On-Call does not answer, then after (time requested by SHA xx minutes the CSR will call the Second On-Call Representative. If the Second On-Call does not answer, then after (time requested by SHA) xx minutes the CSR will call the third On-Call Representative. If the third On-Call does not answer, then after (time requested by SHA) xx minutes the CSR will call the fourth On-Call Representative and if they do not answer the cycle is repeated until someone is contacted.

Anytime any On-call Roster information Changes, SHA will email the information to the email GCCM@gilsonsoftware.com and the Supervisor working at that time will make the changes immediately. Additionally, SHA staff can post these changes to the GCCM System Bulletin Board which is where SHA staff and our Customer Service Representatives (CSR's) can share critical information.

h. GCCS Reports:

A report is produced in the morning and emailed to the distribution list provided by SHA. We

generate Daily and monthly work order Reports and monthly statistical reports. We also have graphical reports that have been requested by some clients which are included. We can have our Software Department make the appropriate changes to our reports upon request. I have attached a copy of the work order report as part of this response.

i. **GCCS New Function Resident Texting:**

PMCC - Screen 1 - Resident Text/Email Enhancement

1. If the Client requests to notify all residents of the work order including work order number the Notify Resident Box will automatically be checked (Please put the "Notify Resident" field between the Tenant Phone Number and Caller name fields. (This will be set-up in the PMCC Preference screen in admin, see next page

2. If the Client does not want the Client to be notified then the box will not be checked; however, it will provide the CSR the ability to check the box if the resident does request to be notified during the call.

PMCC - Screen 1 - Resident Text/Email Enhancement

Sample Text. Please remove the following:

1. Someone Sick
2. Permission to Enter

PMCC - Screen 1 - Resident Text/Email Enhancement

PMCC - Screen 1 - Resident Text/Email Enhancement

Work Orders By AMP (PMAS)
Indianapolis Housing Agency
01/16/20 - 01/17/20

Work Order #	Project	Assigned To	Date Scheduled	Tenant Name	Building & Unit	Created By	Apt	Address	Work Type	Permission To Enter	Work Note
AMP											
46791	Braxton	Michael Robinson	1/17/2020 4:58:09 AM	Mcguire, Joycelyn R (W:317-809-5549) *Previous Contract	B:61002 U:612305	yaremi-web	2305	911 Fort Wayne Ave	Emergency	N	Heater is not working.317-809-5549.WO#546421. YM. Delivered to Michael Robinson at 5:25 AM
46790	Lugar Towers	Michael Robinson	1/17/2020 1:16:59 AM	Sanford, Jeffery B. (H:317-999-2537) *Previous Contract	B:62201 U:621109	yaremi-web	1109	901 Fort Wayne Ave	Emergency	N	Ceiling is leaking in the livingroom.317-999-2537.WO#546420. YM. Delivered to Michael Robinson at 1:31 AM
46789	Blackburn Terrace	Michael Robinson	1/17/2020 12:43:43 AM	Laseter, Nosnibor N. (H:317-740-4486) *Previous Contract	B:11307 U:113133	yaremi-web		2119 E 32nd St C	Emergency	N	Window broken and A/C line was cut.Someone broke in to try to steal A/C.Police wants eta.317-327-3269.WO#546419. YM. Delivered to Michael Robinson at 1:02 AM
46788	Blackburn Terrace	Michael Robinson	1/16/2020 10:53:24 PM	Howard, Krystal M. (W:317-734-2633) *Previous Contract	B:11360 U:113055	florencia-web		3031 Baltimore C	Emergency	Y	Doors - Lock Out 574-355-5842 wo546418. Text SMS Delivered to Michael Robinson at 10:58 PM
46787	Blackburn Terrace	Kervin Perry	1/16/2020 8:06:37 PM	Hodge, Ciara (W:317-809-3930) *Previous Contract	B:11357 U:113037	JESSICA-web		3011 Baltimore C	Emergency	Y	Kitchen sink is clogged 317-809-3930 Taneil L Manns #546417 JS . Text SMS Delivered to Kervin Perry at 8:00PM
46786	16 Park	Kervin Perry	1/16/2020 7:54:09 PM	Gregory, Denesha M. (H:317-775-7138) *Previous Contract	B:500015 U:00 0040	florencia-web	0304	1645 N Park Ave	Emergency	Y	closet Ceiling Leaking 317-775-7138 wo#546416. Text SMS Delivered to Kervin Perry at 7:55 PM

Sample Text

Emergency WO #37174
Job: Plumbing - Leaking Faucet/Pipes
Job Notes: Testing COVID 19 field - Plumbing - Leaking Faucet/Pipes 954-812-5266
Unit: 00 127 TC
Apt:
Address: 1651 N Park Ave
Project: 16 Park
Building: 500016
Job Area: Bathroom
Tenant: Gray, Tyra L.
Tenant Home Phone: 954-812-5266
Tenant Work Phone:
Tenant Cell Phone:
Someone Sick: YES
Permission to Enter:YES. Please reply RECEIVED to confirm as acknowledgment

Queues   Users   Calls   Meetings

DATES	CALL TYPE	QUEUE LENGTH
3 of 106 Queues	All Types	All Length

Queue KPIs   ⚙ Select KPIs

27	02:28	00:44	4	0
# Answered	Avg. Handle Time	Avg. Wait Time	# Holds	# Refused

Trend

PRIMARY METRIC ● Avg. Wait Time ∨   SECONDARY METRIC ● # Answered ∨   **Hour** Day
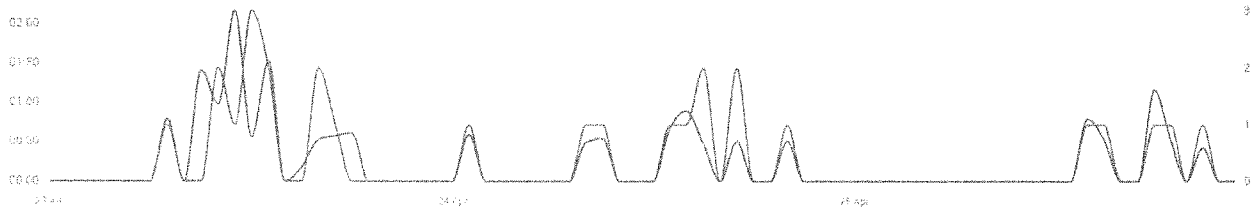
Queues   ⚙ Select Columns   Total 3 Queues   Show: 100 ∨

⇅ Name	⇅ Ext	⬱ # Answered	⇅ Avg. Handle Time	⇅ Avg. Wait Time	⇅ # Holds	⇅ # Refused
Huntsville	315	27	02:28	00:44	4	0

Huntsville Call Center Performance for April 23rd to 25th

Matt Gilson   ↩ Reply   ↩ Reply All   ↪ Forward   ⋯
To: "Dave McCann", tmccann@liveraverj" tvirginia@huskyd.g; Terri Boyd   Mon 4/26/2021 12:12 P
Cc: Gilson Software & Call Center Management

You replied to this message on 4/26/2021 11:51 AM.

Huntsville Call Center Performance Report 042321 to 042321.PNC ∨   📄 Huntsville Work Order Report April 23-26.pdf ∨   Resident Text.PNC ∨
97 KB   100 KB   49 KB

Huntsville Team. Good Morning:

I am attaching the Daily Call Center Reports for the Huntsville Housing Authority for April 23rd to 25th

1. Summary Report with a graph
2. Detailed Work Order Report with Notes Descriptions

There were 27 calls. *With the improvements that we made and the QC Reviews we have improved the average wait time to 23 seconds (44 seconds less the 21 second Announcement).*

We have completed the programming for the automatic texting, completed the testing and the system was updated today.

I have attached a copy of the text that the residents will receive with the Emphasis work order number. Also, we can implement the following:
1. Send a follow-up Text from iWork Order App that Maintenance Staff is on their way to the unit
2. Follow Up text from iWork order App that the job has been completed with the job completion notes.
3. If desired, include in the Text at the bottom a listing of any open Work Order Jobs

Should you have any questions or suggestions

Thanks Very Much

Stay Safe and Be Well

Matt

Gilson Software and Call Center Services
(888) 752-4338 x-100
matt@gilsonsoftware.com

Matt Gilson
President
Gilson Software Solutions
Phone   : (954) 752-4350 (Ext 100)
Cell Phone : (954) 252-2596

Project Management Ability/Quality Assurance

Implementation Plan:

Our high level implementation of the Call Center for Maintenance will be as follows. If we are awarded a Purchase Order then we will provide a more detailed plan including a communication plan.

1. Implementing the Call Center for Maintenance with integration to the Housing Authorities or Property Managers Work Order system. This process is straight forward and usually takes less than 10 days with the following steps that need to be accomplished:

    a. Obtain a download from Housing Authority a *specific Spreadsheet with the property structure and head of household information*.

    b. Set-up all On-Call staff/personnel in our iWork Order system and assign them to their property/properties and their trade, if applicable. This will include their cell phone numbers and email addresses.

    c. Obtain the On-call schedule and update our Work Order System with this schedule. Also, perform training on how to update the On-Call Schedule by property by SHA staff when needed.

    d. Obtain an export of all the SHA tasks/jobs from the Housing Authorities Work Order system and import into our iWork Order System. Additionally, review with SHA Management the priority especially related to emergencies to ensure they are set-up appropriately. Finally, have SHA provide the GCCM staff with a listing of questions for each job/task that SHA would like to have the operators ask during tenant calls.

2. Provide SHA with the appropriate local roll over phone numbers or (800) number, if applicable. Additionally, provide SHA with the specific emergency number that bypasses the phone system for Police, Fire and Elevators calls.

3. After everything is established *provide an On-site or Web demonstration of the functionality to Property Managers and On-Call Maintenance staff* to ensure that all questions have been answered and everyone is following the same plan.

4. Have all properties test the PMAS Service and Go Live.

5. Twice per year we perform an independent survey of the performance of the Gilson Call Center. *We will hire either a Section 3 Firm associated with SHA or hire contractors that are SHA tenants to perform this service.* The results of the survey will be presented to SHA management for review. We will utilize the results of the surveys to improve the service of GCCM. There is no additional cost to perform this survey service.

k. *Quality Control:*
QC Department
Gilson Call Center Services developed our Quality Control Department in 2016. Sandra Altesor is the Manager of Training and Quality Control and has 2 Customer Service Representatives that report to her.

On a daily basis, Ms. Sandra Altesor and her staff will perform audits of a predetermined percentage of calls that are received for SHA and all Clients to ensure that all calls are being handled properly. They are auditing:

1. Recording of Customer Service Representatives
2. Data entry of call into our in-house GCCM System ensuring accuracy
3. Timing of call into GCCM and Client System
4. Review of selection of job by Customer Service Representatives
5. Data entry of call into Client System ensuring accuracy, if applicable
6. Data entry of completed call into Client System ensuring accuracy, if applicable
7. Total time processing call

If they discover any inconsistencies, they will then counsel with the CSR to ensure these issues are resolved for the future.

Finally, Sandra will work with the Supervisor if retraining is necessary or disciplinary action is required. Sandra is also responsible to produce daily management reports for the President and Director of the Call Center that provides with the analysis associated with Key Performance Indicators per Client and CSR such as wait time, hold time, abandon calls, handle time, etc From this analysis, management makes the decisions related to staffing

e. Emergency Contingency Plan

Gilson Software and Call Center Services developed a Disaster Recovery Plan over 10 years ago and as a result, we have gone thru numerous hurricanes and we have never experienced any downtime. Listed below are the four steps of our Disaster Recovery Plan.

<u>Offsite Co-Location:</u> All of our servers are located at Atlantic.Net which is a third party co-location site. <u>https://www.atlantic.net</u> This service is HIPAA Compliant which complies with the two Gilson Call Center Healthcare Clients. Additionally, the service is guaranteed never to go down.

We have our phone system located at Atlantic.net so that this system will also not go down. We have an additional phone system set-up there that is set-up in redundancy mode in case the main system ever goes down. Finally, these systems are also backed up to the Cloud via a service with the phone equipment company.

Atlantic.Net HIPAA Web Server Hosting offers ultra-fast data processing speeds, HIPAA-compliant web hosting features and minimal risk of data crashes. The fast loading speeds of the highly available servers come with security safeguards, high performance, and guaranteed reliability.

HIPAA Compliant Hosting by Atlantic.Net™ is <u>SSAE 18, SOC 1, SOC 2 certified, HIPAA and HITECH audited</u>, designed to secure and protect critical healthcare data, and electronic protected health information (ePHI) and records. Our HIPAA Hosting Solutions have been audited by a <u>qualified independent third party auditing firm</u>, demonstrating our commitment to providing the best IT security and top-notch compliance solutions. Whether you're looking for a comprehensive managed hosting solution for your HIPAA servers or an unmanaged hosting service, we can assist you with all your HIPAA compliance hosting needs. Our high-performance <u>Website</u>, <u>Database</u> and <u>Storage</u>servers are available in both <u>Dedicated</u> and <u>Cloud</u> environments and backed by our 100% uptime guarantee.

Below is an eight-part checklist of HIPAA Compliant Hosting requirements and Atlantic.Net provides all these components to help deliver a HIPAA Compliant Server Hosting Solution:
<u>Firewall</u>
<u>Encrypted VPN</u>
<u>Offsite backups</u>
<u>Multifactor authentication</u>
<u>Private hosted environment</u>
<u>SSL certificates</u>
<u>SSAE 18 certification</u>
<u>Business associate agreement (BAA)</u>

Phone System:

Our phone system is contracted with RingCentral and located in Denver. We also have 2 additional back-up phone systems that include:

A. We have a secondary phone system located at iPitomy and the system is located outside Tampa. If RingCentral goes down, then we can transfer the lines which are at an AT&T Hub.
B. We have a second physical phone system located at Atlantic.net so if the RingCentral and iPitomy phone systems go down we can bring this system up and transfer the lines.

All systems are set-up with a redundancy mode in case the main system ever goes down. Finally, all of these systems are also backed up to the Cloud via a service with the phone equipment company. Multiple Office locations provides us the ability to move our Client calls to other offices in case one office loses power. We currenty additi shown below:
locations. We have set-up these off ⬚ Regular
failure or other issues at an office, as

		Total PHA Operators	
b)	Fort Lauderdale, Florida	21	
c)	Miami, Florida	12	30
d)	Minneola, Florida (Orlando)	3	6
e)	Providence, Rhode Island	2	4
f)	Salem, Massachusetts	2	4
g)	Other Home Offices	70	Unlimited
	Total Staff	110	Unlimited

We have set up these offices with the appropriate equipment, including computers and phones plus the appropriate internet set-up to be able to handle additional staff, if needed. As an example, in 2017 when Hurricane Irma hit Florida, we moved additional staff to Providence, RI and Minneola, Florida and added staff in Miami. Our systems remained operational. We also perform tests twice per year to ensure that we are ready for any downtime.

Dual Internet providers: For all our main sites we have dual Internet Providers in case one provider goes down. As an example, in all of our main offices including Fort Lauderdale and Miami Office we have both Comcast and AT&T. Also, our Comcast Service is set-up with power back-up from Comcast.

Back-up Service: At Atlantic.net we have a back-up service to ensure that all data is backed up daily so we will not lose data during an equipment or power outage.

IT Security Plans:
We have the following plans and can be reviewed, per request.
1. IT OPERATIONS AND MAINTENANCE POLICY
2. SECURITY ASSESSMENT AND AUTHORIZATION POLICY
3. GSCC ACCESS CONTROL POLICY

Managerial Capacity

c. *Management Team:*

The Gilson Software management team has been dedicated to developing software products and services and Service management team prides itself in forming partnerships with its clients in order to develop the kind of software that is able to renovate their operations.

Matt Gilson has developed teams that adapted its operation to support its client base and changed the way traditional software vendors operated in the industry. Matt Gilson was the first software provider in the affordable housing market to recognize the need for more structured implementation, business analysis and other services to assist agencies in the successful implementation of software solutions and services to improve their operations and make them more efficient.

The professionals that make up the Gilson Software Team are knowledgeable, assertive, and creative individuals who are focused on quality products and quality processes. SHA Partner Systems provide users to benefit from the regulatory requirements that are ongoing. We believe in building and fostering relationships and partnerships.

Our mission:

"Gilson Software will produce and maintain software and services that utilizes today's technologies and is based on the needs and requirements of our clients. These software products and services will improve the staff's effectiveness and make their jobs easier and more enjoyable."

Gilson Software will be focused on partnering with our clients in order to determine *best practices* for this industry, so that all of our clients can find the flexibility they need to make our systems work for their authority's processes. These enhancements will be included to our clients at no cost.

Matt Gilson:

Matt Gilson graduated from Syracuse University with a degree in Accounting in 1979. He then worked in Fortune 500 Companies for fourteen years working to CFO of a Worldwide Shipping Company. In 1993, Matt started his dream as an entrepreneur as a partner in Application Oriented Designs (AOD) in Miami, Fl., a software firm that specialized in products for Housing Finance Agencies (HFA's). As a partner, Matt in five years developed a team (32 staff) and increased revenue and profits five times through the development and marketing of the first Low Income Housing Tax Credit software product in the industry. In 1998, AOD was then sold to Emphasys Software, a public housing software vendor wanting an entryway to the HFA market.

In 1998, Matt started Housing and Development Software (HDS) that also specialized in software for Housing Finance Agencies. Matt developed an excellent technical team (52 staff) and they became the leading software firm in the industry. They produced a Section 8 Project Based product for Contract Administrators and obtained over 80% market share with this product. Matt and his team also developed innovative products for Low Income Housing Tax Credits, Grant Management for HOME, CDBG, HOPWA, ESG and other funding sources and the first web based Single Family Management System for HFA Programs. Matt was required to sell HDS in 2008 for personal reasons.

d. *Organization*

Based on our current staffing levels, we would ensure that if we receive the contract/PO with that we would over staff during the first few weeks as we analyze the call volume, even though we are currently handling the SHA call volumes.

Prior to starting and after we have SHA either a visit to SHA or Conference Calls we would perform additional training sessions to all operators and more intense training for Public Housing Specialists related to SHA.

Even though all Customer Service Representatives (CSR's) can answer and have been trained in Public Housing, we will have Sixty-five (65) specialists for SHA calls during the commencement of the service. These CSR's will then spend additional training time with all other CSR's during the second month of service.

Ms. Marilyn Tomas would be the Director that would lead Ismael Sancez CSR-Trainer to perform the training and hiring if necessary and be responsible for communicating implementation status with SHA during this process.

For the first three months, on a weekly basis or until SHA staff require, Ms. Tomas will perform a weekly conference call with SHA staff to obtain an update on the implementation process and handle any issues that arise during this time.

Additionally, our Training and Implementation Departments develop a training video specifically related to information related to the SHA Saford Housing Authority including basic information about the City, weather and specific interests, information about the Housing Authority related number units, housing type, goals and objectives, etc. Finally, the video covers information related to the SHA Yardi System and how it is set-up for data entry, if applicable. Please review a sample

Daily, Ms. Maggie Acevedo and the QC Department, Ms. Betty Covolo, and Ms. Olivia Tomas would perform an audit of all calls that are received for SHA to ensure that all calls are being handled properly and entered into the SHA Work Order System accurately, if applicable. If they discover any inconsistencies, they will then counsel with the CSR to ensure these issues are resolved for the future.

During the weekly implementation meetings with SHA, if Ms. Tomas believes it is necessary, she will include, Ms. Valeria Gilson, Director Call Center Operations and/or Matt Gilson, President.

Listed below is the organization chart for Gilson Software. The Call Center operation is the fastest growing and because of the number of operators we are only listing a count of the staff since their shifts change rapidly.

Gilson Housing Partners
Organizational Chart
As of October 1st, 2023

Gilson Housing Partners
Property Management Operations
Organizational Chart
As of October 1st, 2023
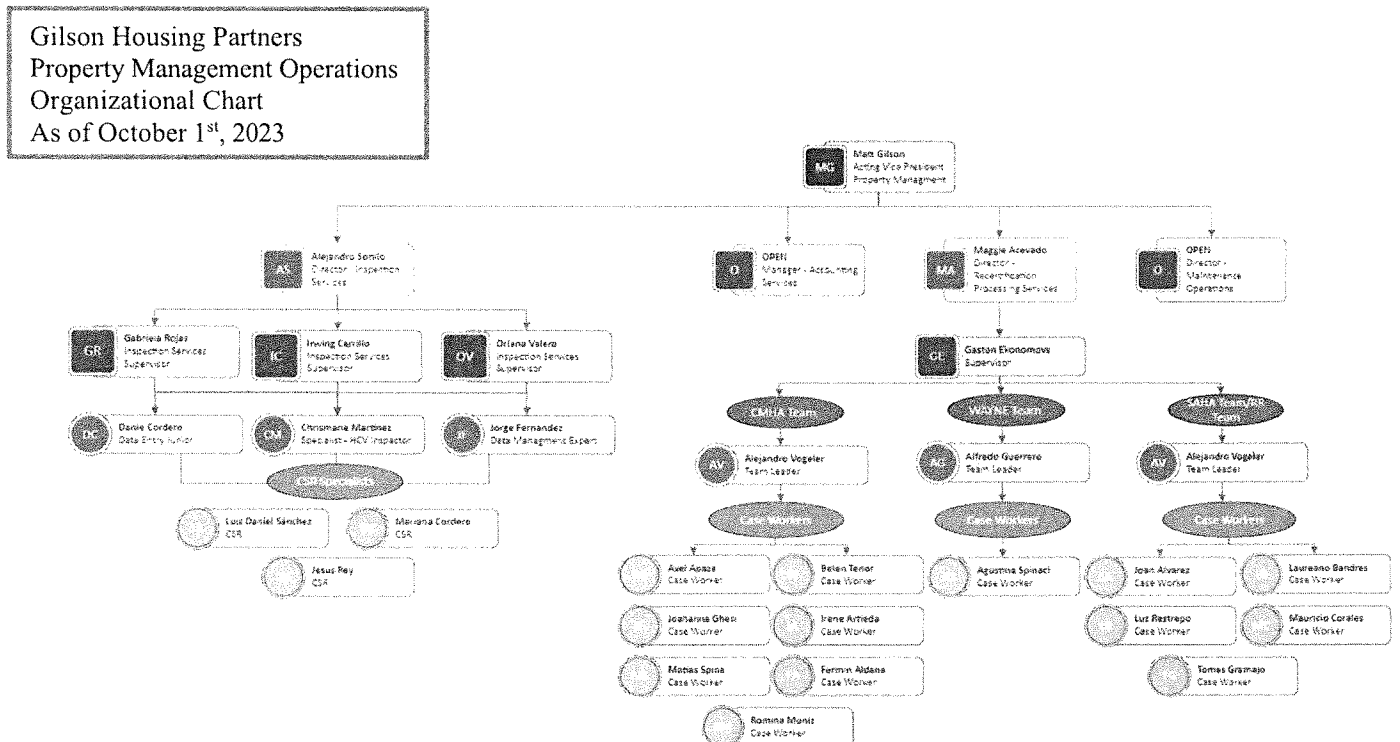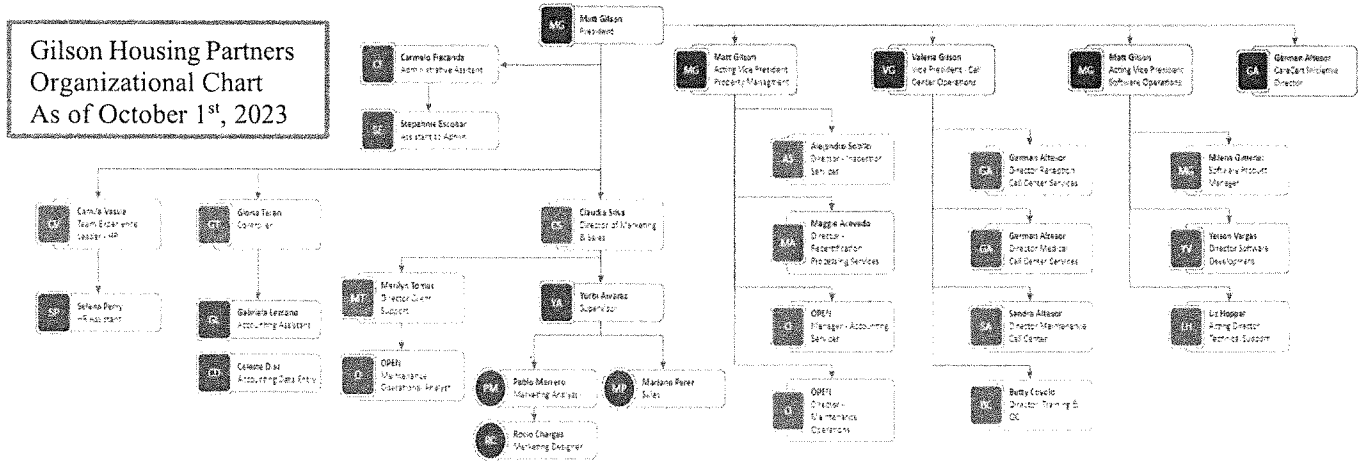
Gilson Housing Partners
Call Center Operations
Organizational Chart
As of October 1st, 2023

VG — Valeria Gilson
Vice President - Call Center Operations

SA — Sandra Altesor
Director Maintenance Call Center

BR — Belen Robles
Supervisor - Weekdays and Sundays

FT — Federico Torielli
Supervisor - Weekdays and Saturdays

FT — Federico Torielli
Public Work Leader

JL — Julieta Llahi
Day/WE Team Leader

OT — Olivia Tomas
Day/WE Team Leader

LC — Lucia Cabrera
Day/WE Team Leader

MG — Maria Grier
Evening/Weekend Team Leader

AR — Alejandra Rodriguez
Day/WE Team Leader

CSR Specialists

3 2
CSRs Specialists

EQUAL EMPLOYMENT OPPORTUNITY (EEO)

Gilson Software Solutions (CONTRACTOR) is an equal opportunity employer, and, during the performance of this contract, the CONTRACTOR agrees to abide by the equal opportunity goals of the SHA Sanford Housing Authority:

The CONTRACTOR will not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, or handicap. The CONTRACTOR will take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to their race, color, religion, sex, national origin, or handicap. Such action shall include, but not be limited to, the following: employment, upgrade, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The CONTRACTOR agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the SHA Sanford Housing Authority Corporation setting forth the provisions of this nondiscrimination clause.

1. The CONTRACTOR will, in all solicitations or advertisements for employees placed by or on behalf of the CONTRACTOR, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin.

2. The CONTRACTOR will comply with all provisions of Executive Order 11246 and of the rules, regulations, and relevant orders of the Secretary of Labor.

3. The CONTRACTOR will furnish all information and reports required by Executive Order 11246 and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the Department of Housing and Urban Development (HUD) and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

4. In the event of the CONTRACTOR'S noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated or suspended in whole or in part and the CONTRACTOR may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order 11246 and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

Matt Gilson, President
(Signature/Title)

Gilson Software Solutions
(Company

Gilson

SOFTWARE SOLUTIONS

Gilson has an app for that.

System Benefits:

- Work Order intake via Property Management Answering Service (PMAS)

- Eliminates Paperwork with Electronic Data Capture

- Improves Data Accuracy

- Increase Maintenance Staff Productivity

- Stores Photos

- Bar coding units for Auto Data entry and tracking

- Electronic Signature

- Printed at designated printers

- Seamlessly Integrates to Desktop Modules

- Now as an *"iPhone and Android App"*
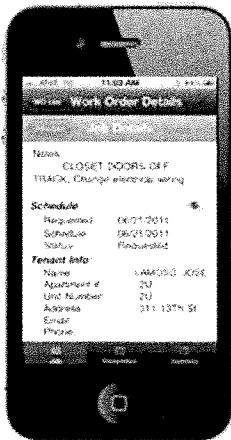
*i*Work Order for PMAS

Gilson Software Solutions *i*Work Order Module completely automates the work order process from receiving work orders, scheduling the work orders, completing the work orders with notes, taking pictures of damages and automatically invoicing tenants for damage, all done on a wireless phone or handheld device.

Scheduling:

- PHA Partner Work Order Module provides the office staff to receive work orders from our Property Management Answering Service, by entering via the Web or calls from tenants. These work orders are assigned to maintenance or On-Call staff or by supervisors on the phone. The synchronization of the schedule can be performed either wireless or directly to the Mobile Work Order Module.

- New emergency work orders can automatically be updated to the Mobile Units Schedule in a wireless environment.

- Assign multiple workers to a work order. Download all work orders for the leader or crew member on multi-assigned work orders

Work Order:

- Login Screen only allows to synch to the person logged-in.
- Add or reschedule work orders in the field.
- Work order information can be updated via a barcode scanner or directly to handheld device.
- Provides capability to add standard work comments/notes or instructions
- Allows multiple jobs per work order request.
- Job Standards can be established providing productivity reporting.
- Provides the capability of electronic signature by the Tenant.
- Records time spent on a work order.

Integration:

- *i*Work Order seamlessly Integrates with any Work Order System including unit and tenant information.

- Integrates with iUPCS Inspection Software. Work orders can automatically be created in the iUPCS Inspection Module.

Gilson Software Solutions

1401 East Broward Boulevard - Suite 101
Fort Lauderdale, FL. 33301
Phone: (888) 252-2338
Fax: (954) 759-4520

sales@gilsonsoftware.com   www.gilsonsoftware.com

Gilson
HOUSING PARTNERS

iNSPIRE

Gilson Housing Partners' new app, iNSPIRE, enables complete inspection process automation. This includes scheduling inspections, sending out letters, and taking pictures of damages, all in compliance with the new NSPIRE standards.

SYSTEM BENEFITS:

- Effective synchronization
- Tablet PC Hardware Supported
- Call ahead via Bluetooth
- Simple No-Show Process
- Improves Data Accuracy
- Increase Staff Productivity
- Provides mapping to the inspection sites
- Take photos in real-time during the inspection
- Electronic Signature
- Ensures Compliance
- Pre-made text message to send to the tenant as a reminder that the inspector is on its way.
- A date picker for the "Complete date" to remind the inspector that is mandatory.
- The tenant's name and address in the inspection process screen.

SCHEDULING:

- Schedules Inspections and produces notifications, repair letters, and notices, which can be customized.
- Produces inspectors work plan for a year and then allows you to copy the plan from one year to the next utilizing the actual inspection/re-inspection dates

INSPECTION:

- Built-in NSPIRE Checklist
- Provides capability to add standard comments during inspection
- Download/Upload scheduled inspections for any time period
- Add or reschedule inspections in the field
- Provides the capability of electronic signature by the landlord and Tenant.

INTEGRATION:

Integrates with PHA Partner and all other Public Housing Authority Software Products

CONTACT US

📍 1401 East Broward Boulevard, Suite 205, Fort Lauderdale, Florida 33301
🌐 www.gilsonsoftware.com
📞 (888) 252-2338

FOLLOW US

in Gilson Housing Partners   f Gilson Software Solutions
O gilsonhousingpartners_   X @GilsonSoftware

*i*HQS Inspection

System Benefits:

- ✓ Smart Phone or Tablet PC Hardware Supported
- ✓ Call ahead via Bluetooth
- ✓ Simple No Show Process
- ✓ Improves Data Accuracy
- ✓ Increase Staff Productivity
- ✓ Provides mapping to the inspection sites
- ✓ Stores Photos
- ✓ Electronic Signature
- ✓ Ensures Compliance
- ✓ Seamlessly Integrates To desktop Modules
- ✓ Now as an *"iPad, Android or WindowsApp"*

Gilson Software Solutions

Fort Lauderdale, FL . 33301
Phone: 888) 252-2338
Fax: 954) 759-4520
sales@gilsonsoftware.com
www.gilsonsoftware.com

Gilson Software Solutions On-site HQS Inspection Module completely automates the inspection process from scheduling the inspection to sending out letters and taking pictures of damages.

Scheduling:

- ➤ Schedules HQS Inspections and produces notification and repair letters and notices which can be customized.
- ➤ Produces inspectors work plan for a year and then allows you to copy the plan from one year to the next utilizing the actual inspection/re-inspection dates

Inspection:

- ➤ Built-in HUD HQS Checklist
- ➤ Provides capability to add standard comments during inspection
- ➤ Download/Upload scheduled inspections for any time period
- ➤ Add or reschedule inspections in the field
- ➤ Provides the capability of electronic signature by the landlord and Tenant

Integration:

- ➤ Integrates with PHA Partner, HAM and all other Public Housing Authority Software Products

Gilson

Gilson
MAINTENANCE SERVICES

*i*Reception

*iReception Module provides the ability performing an **Infrared Thermal Thermometer & Face Recognition (if applicable) checking visitors temperatures for COVID-19, provide front desk assistance with instant video re-certification interviews or meetings,** setting up future appointments, applying or re-certifying on a Kiosk& **unlock the office or property door**.*

"NOW w/ COVID-19 Features"

System Benefits:

✓ **The Kiosk has Infrared Thermal Imaging, Measuring Visitors and Staffs Temperature, Face Recognition & Disinfection.**

✓ COVID-19 Features including unlocking Office & Property Door with body temperature testing, blood pressure testing, video meeting, & COVID Contract Tracing Questions

✓ Tenants, landlords, contractors & other visitors check-in including printing badges for meetings on kiosk

✓ Visitors receive a printed COVID Clearing name badge

✓ Video Calls and Messages performedw/ authority staff

✓ Applicants can apply for or check the waitlist

✓ Tenants can re-certify, enter work orders and Scan & print forms and documents

✓ "Help" starts Video (Zoom) Call withReception Staff for Help

Check-In with COVID Temperature Check & Appointments:

➤ Residents, Landlords, Contractors and Other Visitors can check-in on the iPad kiosk by having their *temperature checked related to COVID* and for pre-established appointments.

➤ Messages & Video Calls are sent to appropriate staff either at the Office or Home locations.

Application, Waitlist, and Re-certifications:

➤ Applicants can apply for housing, check the waitlist for prior applications and obtain answers to FAQ's.

➤ Case Workers can perform Video Conference Interviews with Residents and can perform re-certifications on the iPad by updating family member, income, assets and expense information with incorrect or new information.

➤ Verification documents are imaged by iPad or with a portable scanner for storage in the system for that certification

Authority Staff, Vendors, and Landlords:

➤ Authority staff can check on and respond to email messages, make copies of payroll stubs, and complete human resource forms. Vendors and Landlords can print payable stubs, obtain 1099 information and complete other necessary forms.

Frequently Asked Questions & Integration:

➤ There is a section of FAQ's for Applicants, Tenants, Landlords, Vendors and other Visitors on iPad.

➤ Integrates with all Industry Housing Management Systems

![Gilson Maintenance Services logo]

Benefits:

✓ Director of Maintenance performs quality control reviews of work performed

✓ Maintenance Staff maintains all information via the iWork Order App including before and after pictures and time spent and sends material requisitions to HA Staff

✓ iUPCS Inspection App is utilized to perform the "Take Off" Sheet and also integrates to the iWork Order App.

✓ Increase Maintenance Staff Productivity

✓ Stores Photos

✓ Bar coding units for Auto Data entry and tracking Electronic Signature by Workers

Gilson has a Service for that.

Maintenance Services
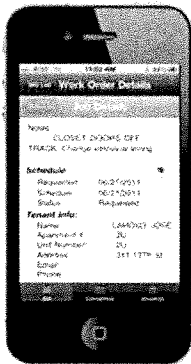
Gilson Maintenance Services (GMS) ensures quality work by establishing SOP's (Standard Operating Procedures) for all work performed. We facilitate the process for the Housing Authority by ensuring quality work in a timely manner. This is performed by ensuring that we have hired high quality sub-contractors and utilize specialists for different work functions such as plumbing, electrical, painting, etc. We utilize technology to increase efficiencies and improved communication with our HA Call Center and iWork Order & iUPCS Inspection Apps.

After Hours Maintenance:
- Our After-Hours Maintenance staff receive work orders from our HA Call Center which work orders are synchronized to the On-Call staff mobile device and iWork Order App.
- All jobs have specific SOP/Instructions to ensure high quality work.
- Work orders are assigned to appropriate on-call maintenance staff based trade to ensure quality work.
- Major issues like water leaks, major damage are quickly resolved but not replaced and work orders are forwarded to the HA Day Maintenance Shift.
- Assign I workers to a work order. Download all work orders for the leader or crew member on multi-assigned work orders

Unit Make Ready (Turn around):
- Housing inspections are performed via the iUPCS Inspection App-Make Ready Template to produce a Punch List and Take Off Sheet in an efficient manner.
- Work Orders are created and assigned from the Inspection App and synchronized to the Maintenance Staff's iWork Order App based on Trade.
- Work order's are assigned to a Make Ready Team to reduce turn time and improve quality
- All work receives a quality control review by a supervisor and month reviews by a Director.
- Major damage and issues are properly document within the appropriate App thus improving the possibility of recovering for damage.

Reception Call Center

Gilson Software Solutions 'Reception Call Center(RCC) is absolutely essential in providing constant attention to all HA Client requests. Gilson specializes in a wide variety of software specifically designed for property management, so you can rest assured that your Authority is in good hands.

Reception Call Center:

> Applicants, Tenants or other HA Clients are assisted by highly knowledgeable, bi-lingual Call Center staff members who are able to give proper instructions based on HA provided information.

> Call Center Operators provide applicants with updated Wait List status information, plus information related to the HA's programs and/or Properties.

- Tenants are provided with information related to their re-certifications or inspections, can change their interview or inspection dates and obtain information related to their rental or account balances.

- The iReception Software automatically emails HA Staff of changes made by the Call Center staff based on applicant and tenant assignments.

- HA Staff notifies Call Center staff of times when they are busy or "Do Not Disturb Time" and Call Center staff will take recorded voice mails and email to HA Staff phone.

iReception Compatibility:

> iReception Software App are installed on Kiosks in the HA Lobby and provided on the HA Web Site to streamline the process and provide Applicants, Tenants and Other HA Clients with 24/7 access to information.

Third-Party NSPIRE Inspection Assessment & REAC/NSPIRE Training

NSPIRE Inspection Proposal

From: **Sales Team**
U.S. Inspection Group, Inc.
sales@usinspectiongroup.com

To: **Michael Threatt**
Sanfrod Housing Authority
mthreatt@sha-nc.org

January 8, 2024

NSPIRE Inspection Services

Proposal

NSPIRE Inspections
HCV/S8 Inspections
NSPIRE Training
Fixed Asset Inventory
Utility Allowances

U.S. Inspection Group, Inc
825 S. Church Street
PO Box 899
Murfreesboro, TN 37133

www.USInspectionGroup.com
866.863.8744 (toll free)
866.573.3280 (fax)

Introduction

U.S. Inspection Group is pleased to present this NSPIRE Inspection proposal.

With unparalleled expertise in REAC preparation, USIG has been at the forefront of the industry since the inception of REAC in 1998. We invite you to leverage our extensive knowledge to optimize your score while keeping your maintenance budget intact.

Consolidating your needs into a single package can provide significant financial benefits, including multi-service discounts. You have the flexibility to choose from any combination of the services listed on the pricing grid on the following page. Detailed descriptions of each service are provided in the pages that follow. We trust that this information will be helpful and informative. Should you have any questions, please do not hesitate to contact me directly at 866/863-8744.

Key Considerations

- Over 2 Million Units Inspected, with more than 2,000 Happy Clients
- Proprietary Inspection Software for efficient & accurate assessment
- Detailed, Customized Reports in 24 Hours - including Defect photos
- Over 25 Years Of Consecutive Years Involved with REAC
- Ability to Import inspection results into several Work Order Systems
- Proven Track Record of Reliability and Client Satisfaction
- Guaranteed Lowest Qualified Price

Fee Page

NSPIRE Inspections & Upgrades				
Service	**Detail**	**Unit Count**	**Unit Price**	**Total**
100% Inspection Includes All 3 NSPIRE Inspectable Areas "Outside", "Inside" and "Units"	1 Year Agreement	167	$12.50	$2,087.50
	2 Year Agreement	167	$12.50	$2,087.50
	3 Year Agreement	167	$11.90	$1,987.30
Travel - Per Diem - Hotel	Costs associated with travel, food and lodging	-	$0	No Charge
Optional Upgrades				
Defect Pictures	Includes Pictures of EVERY Defect *(best value)*	167	$2.40	$400.80
	Includes Pictures of only *UNIT* Defects	167	$1.90	$317.30
	Includes Pictures of *"OUTSIDE"* Defects	167	$1.40	$233.80
Resident Notices	First Class Mail to each Resident	167	$2.90	$484.30
Housekeeping, Pets and Smoking Inspecton	Review Each Unit for Housekeeping Issues, Evidence of Pets and Smoking (includes photos)	167	$1.40	$233.80
"Curb Appeal" Inspection	Review of Entire Property For Curb Appeal (further details below)	167	$2.40	$400.80
Import Results	Results Ready for Importing To Work Order System	167	$1.40	$233.80
Fixed Asset Inventory (Bar Coding)	Refrigerators & Stoves	167	$4.90	$818.30
	Additional Items (each)	167	$1.00	$167.00
Utility Allowance	Calculate allowances based on unit type	-	-	$-

Additional Services			
Service	Detail	Unit/Time	Total
NSPIRE Training	Private NSPIRE Training (webinar)	4 Hours	$4,400.00
	Private NSPIRE Training (classroom or in-field)	1 Day	$6,400.00
	Private Classroom and In Field	2 Days	$8,900.00
REAC Escorting	Shadow/Escort REAC Inspector	Per Day	$-
Mock REAC Inspection	Complete Site inspection along with sampling of Units and Buildings (mimicking an actual REAC)	$-	$-

Pricing Details

NSPIRE 100% Inspection

U.S. Inspection Group is the nation's leader in providing housing agencies with a comprehensive full inspection. USIG will inspect 100% of your housing units, sites, common areas, building systems and exteriors (now called "Outside", "Inside" and "Units") to comply with your requirements and to prepare for any potential upcoming REAC inspection.

- $12.50 per unit (1 or 2 year contract)
- $11.90 per unit (3 year contract)

Add Pictures of Defects

USIG can include pictures of defects incorporated into your web-based reports. Choose which defects for which you would like pictures.

- $2.40 per unit (**ALL** defects) - BEST VALUE
- $1.90 per unit (**UNIT** defects only)
- $1.40 per unit (**Outside** defects only)

Resident Notice

USIG will send resident notices announcing the upcoming inspection to residents via first-class mail, ensuring they receive adequate notice

- $2.90 per unit

Inspection for Housekeeping and Evidence of Pets and Smoking

USIG will conduct a comprehensive inspection of each apartment, thoroughly documenting the condition of housekeeping and any potential evidence of pets or smoking, with a strong emphasis on capturing detailed photographs.

- $1.40 per unit

Curb Appeal Inspection

USIG provides a thorough property review service tailored for offsite management. This service identifies potential issues beyond the NSPIRE protocol's scope and includes detailed photographs along with a **customizable** checklist. Common concerns addressed are abandoned vehicles, overgrown landscaping, power washing requirements, improperly placed satellite dishes, charcoal grills too close to buildings, debris, trash, and various other property-related issues.

- $2.40 per unit

Import Defects into Housing Software

USIG can format reports ready for importing directly into several major housing software systems eliminating the need for countless hours of data entry.

- $1.40 per unit

Fixed Asset Inventory

USIG will electronically identify, log, tag and report the assets located in your dwelling units including refrigerators and stoves. The information captured includes building #, unit #, make, model # and condition.

- $4.90 per unit (refrigerators and stoves)
- $1.00 per unit (per additional item)

Utility Allowance

Required annually, USIG can easily meet your requirement with this add-on service.

- Not Priced

REAC Escorting

USIG will provide a representative on your behalf to supervise your actual REAC inspection to ensure improper deficiencies are not forced into the software and the correct protocol is used. USIG will also assist in compiling an appeal if necessary.

- Not Priced

Mock REAC Inspection (sampling inspection)

USIG will conduct a comprehensive inspection of 100% of your site and common areas, along with a representative sampling of units, building exteriors, and systems, following the same methodology and unit count as a REAC inspection (if needed, we can adjust the sample size to accommodate your specific requirements). You will still receive the same complete set of reports provided in a full 100% inspection.

- Not Priced

Private REAC Training

Our training is like no other - Once participants have completed USIG's training session, they will fully understand the NSPIRE and the scoring implications of each possible defect. This in-depth training is unique in that our focus is on the point value assigned to each defect by HUD/REAC. This is the only way to dramatically increase your score. The two-day session includes in-the-field training and an examination.

- $4,400 (4 hour private webinar)
- $6,400 (1-day session)
- $8,900 (2-day session)
- If you would like additional information about our trainings, please take a look HERE.

About US

Since 1998, U.S. Inspection Group, Inc. has been a trusted leader in REAC inspections, partnering with over 2,000 housing agencies, evaluating more than 100,000 buildings, and inspecting over 2,000,000 units nationwide. With unmatched expertise and a proven track record, we set the standard for thorough and reliable inspections across the industry.

We pioneered the pre-REAC industry

We have earned our place at the top of the Pre-REAC inspection field by delivering outstanding service at a fair price. Our commitment to quality and affordability ensures your property receives the expert attention it deserves without exceeding your budget.

Ken Pilbin President • NSPIRE Trainer

Ken, a founder of USIG, is the leading expert in both REAC protocols and the inspection business, with over two decades of unmatched experience. His in-depth knowledge and strategic approach have made him a trusted authority in the field. Beyond shaping the success of USIG's inspection services, Ken has taken his expertise nationwide, conducting training sessions to help others excel in REAC preparation. With his proven leadership and industry mastery, Ken has set the gold standard, solidifying his reputation as the best in the business.

Karen Howard General Manager

For over two decades, Karen has been expertly managing the operations of the USIG team. As the driving force behind scheduling over 5,000 apartment inspections each week, she ensures every detail is handled with precision and efficiency. Karen's leadership and organizational skills are essential to keeping our operations running smoothly, making her an indispensable part of our success.

Kim Koger Data Specialist

Meet Kim, the first official employee of USIG and a cornerstone of our team. With extensive experience in managing inspection reports and delivering exceptional customer service, Kim plays a vital role in ensuring our clients receive accurate and timely results. From organizing data to producing detailed reports, her dedication and expertise have been instrumental in building the trusted reputation of USIG. Kim's commitment to excellence makes her an indispensable part of our success.

Teresa Pilbin Accounting Manager

Teresa brings a wealth of experience to USIG as a highly skilled accountant with a background in managing finances for large corporations and non-profits. Her expertise in financial management and dedication to precision have been invaluable to our operations. At USIG, Teresa applies her extensive knowledge to ensure our financial processes run smoothly and efficiently, making her an integral part of our team.

Jaida Pecorari Staff Accountant

Jaida is a vital part of the USIG team, managing payroll, invoicing, and ensuring smooth financial operations for both inspections and training services. Her attention to detail and dedication keep everything running seamlessly. Fridays might mark payday, but they've also become a celebration of Jaida's hard work and indispensable contributions to the office

Alexis Feindel Client Coordinator

Alexis handles the complex responsibilities of contracts and scheduling with exceptional skill. Though she may be a newer face at USIG, she has quickly become an integral part of the team, managing paperwork and ensuring everything runs smoothly behind the scenes. Beyond her expertise in handling contracts, Alexis is known for her positive attitude and dedication, making her a standout not only for her work but for being an outstanding team member as well.

John Emery NSPIRE Trainer

Guru might be pushing it, but John is widely recognized as the foremost expert on REAC inspections and training in the country. As one of HUD's original Certified REAC Inspectors and Trainers, he has been a trusted resource for USIG and housing agencies nationwide. With decades of experience, starting in the '90s, John has an unparalleled understanding of REAC standards and protocols. He's also the author of our comprehensive REAC prep guidebooks, solidifying his position as the leading authority in the field. John's expertise makes him the top authority in REAC inspections, and we are fortunate to benefit from his knowledge

Sarah Curry Training Coordinator

Meet Sarah, our Training Coordinator, the driving force behind the success of our training sessions. With her organizational skills and deep knowledge, she simplifies the complexities of NSPIRE information, making it accessible and engaging. Sarah excels at multitasking, efficiently managing everything from shipping our renowned guidebooks to coordinating logistics for over 100 hotels for our NSPIRE training classes. Her attention to detail and ability to handle numerous responsibilities make her an essential part of our team.

Kenny Pilbin HCV Department Lead

Kenny, the talented son of Ken and Teresa, joined USIG after completing graduate school, taking on a leadership role in our HQS division. With a strong background and dedication, he's quickly made his mark within the company. As he takes on the challenges of managing the division, Kenny's focus and expertise continue to drive our success, and while the transition from college to professional life may come with its challenges, he's embracing the opportunity to grow and lead.

Experienced Inspectors Nation's Best

Meet our inspection team, a group of dedicated professionals committed to providing the highest quality inspections. With over 100,000 inspections each, our team brings unmatched experience and attention to detail to every job. Their thoroughness and expertise ensure that no issue goes unnoticed, and they consistently deliver accurate, reliable results. Trained to the highest standards, our inspectors are key to setting us apart in the industry, delivering exceptional service and making the inspection process as efficient and seamless as possible.

Why 2,000+ Agencies Trust USIG

To Improve REAC Score

"All 33 of our sites are currently at 90 or above.....thanks again for all your effort in helping us get to this point" - Tennessee Housing Agency

When a REAC inspection is approaching, the best way to prepare is by conducting a thorough pre-inspection. USIG's team, including our inspectors and support staff, is fully focused on helping our clients achieve the highest possible scores. Many clients have seen significant score improvements by scheduling a USIG inspection just 6-8 weeks before their REAC inspection.

To Utilize USIG's Experience

"Your inspector was outstanding, we appreciate his vast knowledge and assistance" - Missouri Housing Agency

USIG has partnered with over 2,000 housing agencies across nearly every state. Each of our inspectors conducts more than 12,000 apartment inspections annually, while our office team regularly communicates with numerous agencies nationwide. By working with USIG, you can tap into this invaluable experience to benefit both you and your staff.

USIG's Office Is Dedicated to Success

"Thank you for the follow up....we appreciate USIG's support, cooperation and assistance provided by your office staff. Please convey our thanks....we are very pleased!" - Rhode Island Housing Agency

USIG's office staff is separate from our inspection team, ensuring that someone is always available to assist you. With the largest inspection staff in the country, USIG is prepared to conduct inspections whenever you are ready. In addition to supporting you before your REAC inspection, our team is also available afterward to review your REAC reports, identify appealable items, and help compile your appeal.

To Meet HUD Requirement

"You have made getting our annual inspections completed so easy. Our auditor just showed up and we simply laid your bound reports in front of him and he was more than happy. Not sure why everyone doesn't use this service. - Mississippi Housing Agency

USIG can promptly, efficiently, and cost-effectively fulfill your HUD requirement to inspect all units, common areas, sites, building systems, and exteriors in accordance with REAC protocols. In fact, USIG will provide you with the necessary details for your MASS reporting based on the inspection results. Given today's budget constraints and increased demands, partnering with USIG for your property inspections is the most cost-effective solution to meet HUD's REAC requirements.

To Train Staff

"Our scores....99, 97, 95 and 89 - I could not have done this without your class. You gave us what we needed, so we could take care of items that matter. Because of your class we didn't waste time on small things" - Oregon Housing Agency

USIG offers one- and two-day training sessions focused on scoring. Our trainers have received excellent feedback for effectively guiding housing management and maintenance teams on how to prioritize tasks and prepare properties for a REAC inspection.

Are We Experienced?
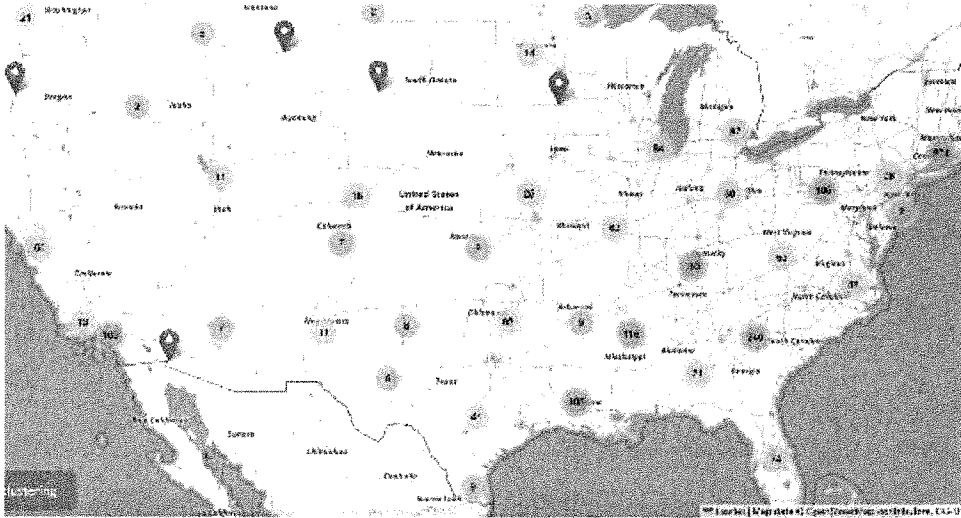
Is 2,000+ Clients & more than 2 Million Unit Inspections Enough??

Experience of Company

- Year of initial REAC training: 1998
- Year of first REAC certification: 1998
- Continuous years involved with REAC: 25+
- Number of units inspected: >2,000,000
- Number of buildings inspected: >200,000
- Company Incorporation Date: November 2000

Capacity to Perform

- Number of Inspectors: 25 of the best trained in the nation
- Scheduling Inspections: With our large inspection staff, we can typically be onsite within days
- Reporting: USIG can provide our renowned reports in any format; including hardcopy, electronic format (Word, Excel, PDF) and Web based
- Hardware/Software: iPads with propriatory software/app

Continuing Education

- USIG has identified continuing education as a top priority. By utilizing on-going training classes, and regular update letters/e-mail, we are able to ensure all of our inspectors are the best-trained, best-equipped, and most qualified inspectors in the industry. In addition, performance reviews are done on all our inspectors on a quarterly basis. Since our proprietary software provides summary data, we are able to compare inspection information with our staff thereby continuously evaluate individual and company performance.

Scope Of Services

NSPIRE Annual Inspections
Fixed Asset Inventory
Utility Allowance
REAC Inspection Shadowing
REAC Training
Mock REAC Inspection
Work Order Review

NSPIRE Inspection Service

Highly trained inspectors (each with tens of thousands of inspections under their belt) will inspect your properties per the current NSPIRE protocol (V3.0). We will inspect the site, building exteriors, systems, common areas and all units (now called "Outside", "Inside" and "Units"). It will be to your benefit that our team will emulate your future REAC inspection so you will know the status of your property well in advance. Because of USIG's desire to improve your score, we will provide you with a detailed report, Recommended Corrective Actions, a cost estimate of repairs, an estimated property score, assistance in the appeals process (if necessary) and toll-free phone consultation.

Detailed Description of the Inspections:

- 100% Inspections of all properties according to the requirements of HUD/REAC.
- Inspection scheduling will be closely coordinated with housing representatives. USIG personnel will be appropriately attired, courteous, accompanied by site personnel at all times and conduct themselves in a professional manner consistent with the REAC requirements.
- The actual number of units inspected will be based upon the total number of units at a property and will include all units on the property, both occupied and vacant.
- Inspections will address all NSPIRE Inspection Areas, including: (1) Outside (2) Inside and (3) Units.
- Inspections shall include:

- All items interior and exterior required to be inspected under a completed NSPIRE inspection.
- USIG providing and utilizing specialized software to complete and document all deficiencies identified in the inspections.
- All "Severe" Health and Safety defects, as defined by REAC, will be specifically documented to site personnel on a daily basis (these are the issues that must be corrected within 24 hours).
- USIG will provide reports (both hardcopy and web-based) to include:
  - Deficiency report
    - Includes location, comment and point value for every defect
    - Includes photos of each defect (if desired)
    - Includes an Excel file listing all defects for easy sorting and filtering
  - Unit-by-Unit Deficiency report
  - REAC Scoring report
  - PHAS Management Operations Certificate
  - Housekeeping/Pets/Smoke report (if desired)
  - Property Profile reports
  - Recommended Corrective Actions reports
- The review, with the full cooperation of PHA personnel, of all physical certifications required under PHAS is to include: boilers, elevators, fire alarms, lead based paint and sprinkler systems. USIG is to verify the existence of these certifications and their suitability under REAC requirements. USIG will verify the existence of lead-based paint disclosure forms through a random sampling of resident files in each development.
- All required documentation for the inspections will be completed and submitted to agency in a format that is clear, complete and easily understood.
- The calculation of all NSPIRE inspections will be scored in such a manner as to be nearly identical to the scoring used in a REAC inspection. USIG is to fully take into account the REAC scoring system's calculation of relative weights and values for inspection areas and provide the agency with accurate inspection scoring.

- USIG will provide it's exclusive Recommended Corrective Action (RCA) report. This report can be utilized as a complete, workable and efficient action plan for correcting deficiencies identified and for improving future NSPIRE assessments for the units and communities inspected. The RCA report will illustrate how to repair numerous reoccurring deficiencies in the most timely and cost effective manner.
  - Coordination with housing employees to schedule required inspections, to ensure the timely completion of all inspections, and to minimize disturbance of the community residents.
- USIG will provided an overview of the National Standards for Property Inspection of Real Esate (NSPIRE) with Staff Personnel. This includes an overview of the Real Estate Assessment Center (REAC) NSPIRE standards and review of common deficiency definitions and deficiency scoring.
  - We also suggest that you send along any personnel with interest in the NSPIRE with our inspector for several days of great hands-on training in this new and ever-changing NSPIRE protocol.

Optional Services

Resident Notices

USIG will mail resident notices announcing the upcoming inspection to ensure all residents are informed well in advance. These notices will be sent via first-class mail, guaranteeing timely delivery and providing residents with adequate time to prepare. By handling the notification process directly, USIG reduces the administrative burden on office staff, allowing them to focus on other priorities while ensuring clear and effective communication with residents.

Housekeeping, Pets and Smoking Review

USIG will perform a detailed and thorough inspection of each apartment, carefully assessing the condition of housekeeping and looking for any signs of pets or smoking. During the inspection, special attention will be given to documenting details that could impact the overall condition of the apartment. This includes evaluating cleanliness, possible pet presence, odors, or other evidence of smoking. To ensure accurate records, a significant emphasis will be placed on capturing high-quality, detailed photographs of any issues observed, providing clear visual documentation for future reference and reporting. This comprehensive approach helps maintain a clear and objective record of each apartment's condition.

Curb Appeal Inspection

USIG offers a comprehensive and customizable property review service, tailored to support offsite management with an accurate and detailed assessment of the property's overall condition. The service includes a thorough checklist that can be adjusted to address specific concerns or needs unique to the property. Our team will inspect various aspects of the property, capturing detailed photographs to document issues such as abandoned vehicles, overgrown landscaping, areas needing power washing, improperly placed satellite dishes, charcoal grills positioned too close to buildings, and other potential hazards. The inspection will also identify debris, trash, and any maintenance or compliance issues. By providing both detailed photographic evidence and a flexible checklist, USIG ensures property owners and managers can effectively maintain the property's appearance and functionality, while addressing any concerns promptly and efficiently.

Fixed Asset Inventory (bar coding)

USIG can identify, log, tag and report the fixed assets located in your dwelling units including refrigerators and stoves. USIG will visit each unit and affix a permanent label and report asset requested information by the housing authority to include but not limited to items such as the serial number, make, model, color, condition, building and unit number. This information will be logged electronically and provided to the housing authority in print and on CD. USIG will also retain this information for future annual tracking of housing authority's assets.

Utility Allowance

Along with USIG's strategic partner, 2rw, our energy engineers have developed a web-based tool for calculating utility allowances – UApro^{TM}. This tool combine the expertise of 2rw's engineers – over 20 years of experience working with HUD and hundreds of Housing Agencies – with the power of an online, automated allowance calculator to provide an **unprecedented** combination of **affordability** and **accuracy** in calculating allowances. UApro^{TM} uses calculated consumption data along with local utility rates and weather trends to compute utility allowances for specific unit types at specific locations.

REAC Escorting

USIG can provide a representative on your behalf to supervise the actual REAC inspection to ensure improper deficiencies are not forced into the software and the correct NSPIRE protocol is used. We will provide to you a report detailing our overall summary of the inspector and the inspection along with detail on any discrepancies cited within the protocol. In addition, we will review your REAC Report for any potential opportunities for appeal and will assist you in writing the appeal. It is always to your advantage to have someone well-informed of the current NSPIRE protocol and specific definitions with your best interest in mind. Escorting gives you confidence that all of the work that your staff has performed is protected.

REAC Training Class

Since REAC's inception, USIG has trained both inspectors and housing agencies nationwide. This training class is formatted for either one-day or two-days and is an extremely efficient use of your time. Whether you plan on inspecting your units with your own staff or having our staff inspect, you will find that this training will educate your staff allowing for a more effective staff in keeping the properties and units in order on an ongoing basis. You may have anyone on the housing staff attend this class at no extra charge. Our training will include an overview of the NSPIRE protocol coupled with in-depth study of the most critical inspectable areas. Using hundreds of actual photos, our instructor will educate you on what to look for when entering every apartment. We will work with site personnel to develop a simple yet detailed, single-sheet checklist that can be used by maintenance mechanics when entering any unit to aid in locating and alleviating defects according to NSPIRE throughout the entire year. This training and checklist will ensure you are ready for your next REAC inspection especially when used in conjunction with USIG's professionally performed 100% inspections.

Mock REAC Inspection

In this inspection, USIG will simulate your REAC inspection to give you and your Maintenance team an idea of your physical condition and potential REAC score. USIG will randomly select approximately 20% of the dwelling units and buldings along with 100% of the sites and common areas. Similar to the full 100% annual inspection, you will receive all the same detailed reports as described in the NSPIRE Inspection section.

Summary

It is our goal for your housing agency to be well informed and aware of your properties condition so that you and your staff can be proactive in administering your programs. In addition, it is our hope to keep you in compliance and thus reducing any unnecessary stress on your staff, allowing you to concentrate more on the quality of your programs for your residents.

Our concern is not just in meeting your requirements,but instead consider ourselves partners with you.

Reports

Do reports make a difference?

........YES!

USIG inspectors use custom inspection software that we have developed to surpass the requirements of our clients. This enables us to offer detailed reports on the condition of your units and properties, providing specific information on each deficiency, including location, comments, point deductions, actual defect images, and more. We also offer supplementary reports like Housekeeping and a completed MASS Certificate for your annual reporting.

Moreover, the software is crafted to enhance inspector efficiency, minimizing inconvenience to your staff and residents. Feel free to explore our sample reports to experience the noticeable difference firsthand.

REAC Score Report

Photo Defect Report

Defect Report

REAC Prep Priority Report

MASS Certification Report

HouseKeeping Report

Single Unit Report

References

U.S. Inspection Group has conducted pre-REAC inspections for over 2,000 happy clients in nearly every state.

The following is a very small number of our many satisfied clients

Housing Agency	Contact	Phone #	Email	# of Units	Inspection Years
Rahway, NJ	Rick Ansley	732-499-0066	ransley@rha165.org	275	2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024
San Antonio, TX	John Stewart	210-477-6009	john_stewart@homesa.org	6,500	2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024
					2004, 2005,

Housing Agency	Contact	Phone #	Email	# of Units	Inspection Years
Sparta, TN	Jim Payne	931-836-3357	jimp@spartahousing.com	162	2006, 2007, 2008, 2009, 2010, 2011, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024
Tuscaloosa, AL	Olesia Southall	205-758-6619	osouthall@tuscaloosahousing.org	1,237	2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024
					2006, 2007, 2008, 2009, 2010, 2011,

Housing Agency	Contact	Phone #	Email	# of Units	Inspection Years
Ventura Co., CA	Bud McGhee	805-480-9991	gmcgehee@ahacv.org	355	2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023
Malden, MA	Ed Fahey	781-322-3184	ef223@maldenhousing.org	1,195	2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024
Chattanooga, TN	Larry Daniels	423-752-4454	ldaniels@chahousing.org	2,700	2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024

"Choosing to use your service was one of the best decisions we have ever made!" **TX Housing Agency**

"In just the one year that we had you in here, we learned a lot and scored in the 90's just last month in our HUD inspection. If you need any letters or anything, just let me know." **AR Housing Agency**

"Your price in not that expensive and your inspection is great. I don't have to worry about it. I just show them your book and I know that it was inspected right and all of their questions are answered." **NC Housing Agency**

"We're very pleased with the layout of the binder, the detail of the reports, and the fact that you certify the MASS results. Hopefully we have an option to renew. If not, we'll consider it a lesson learned." **MT Housing Agency**

"Yes, we absolutely plan on having you back this year. I just need to get Board approval first. For what you offer, there is no way that I could come close financially to inspecting ourselves for what you charge." **TX Housing Agency**

"The inspection went great. Your inspector was a nice fella and was very helpful. The reports are here. You sure provide a wealth of information. I added two more years to my contract." **CT Housing Agency**

"The inspection went smooth as silk and your inspector was fabulous. We are very happy to hear these things before REAC gets here and lambastes us." **MA Housing Agency**

"You guys have done us a great service. In the two years that I've been here and used you, we have gone from a 67 to a 98." **KY Housing Agency**

"With REAC coming is just one month, this inspection is perfect to help us target areas to work on." **TN Housing Agency**

"Your inspector was very personable. I'd like to do this every year. I also think that your inspector had more clout with my tenants. They seemed to listen to him." **MI Housing Agency**

"The reports are great and the inspection was wonderful. I've been recommending you to everyone. **LA Housing Agency**

Contract for Services

This Contract Agreement is entered into this the day noted on the "Cover Page" by and between the company noted above acting through its appointed officer as noted above hereinafter called Housing Agency, and **U.S. INSPECTION GROUP, INC, 240 Old Jamestown Hwy, #2838, Crossville, TN 38558** hereinafter called USIG.

WITNESSETH

WHEREAS, the parties hereto have entered into a business arrangement and agree as follows:

1. USIG shall perform HUD Real Estate Assessment Center (REAC) National Standards for Property Inspection of Real Estate (NSPIRE) Inspections.

2. The Housing Agency shall have USIG proceed with the inspection of each of Housing units located in all developments. USIG shall indicate the physical condition of each development, including the "Outside", "Inside" and "Units" Each of the three major component areas includes a list of the categorical inspection items to be evaluated for compliance and deficiencies. Each "Area" and "Inspectable Items" shall be inspected based on the HUD/REAC (NSPIRE) protocol. USIG inspectors will make a minimum of two (2) attempts to gain entry to all units. Should a unit be inaccessible for any reason following these attempts, the unit will be deemed "uninspectable", and it will remain on the billing invoice (offline units will not be invoiced). Property deficiencies that are considered Life Threatening Health and Safety hazards shall be submitted daily to the Housing Agency. This shall be done under the NSPIRE standards.

3. Inspection reports based on the inspector's observations shall be submitted as follows:

   A. Inspection observations (deficiencies) that are found that would be considered by REAC to be Life Threatening Health and Safety hazards (emergency) shall be reported daily.
   B. Inspection observations (deficiencies) that are found that would be considered by REAC to be routine shall be reported as each development is completed.
   C. Upon completion of each development, a complete Deficiency Report, Recommended Corrective Action (RCA) Report, Property Profile Report, Score Report, House Keeping (if desired) and Single Unit Report shall be provided to the Housing Agency.

4. **WRITTEN ADDENDUM OR CONTRACT AMENDMENT**: All additional services not expressly required by this agreement shall be agreed to through either a written addendum or amendment to this agreement.

5. **SCHEDULES**: Services shall commence on **a date to be mutually agreed upon**, subject to acts beyond the control of the parties including acts of God. Any change from dates shall be by mutual agreement of the parties. Any action not timely completed by USIG shall be subject to arbitration. If the two-year option is selected, the schedule for **FY 2026 is "To Be Determined".** If the three-year option is selected, the schedules for **FY 2026 and FY 2027 are "To Be Determined".**

6. **COMPENSATION AND PAYMENT TERMS:** See "Fee Page" in the Service Proposal for detailed pricing structure. Payment shall be compensation for services required, performed, *or* accepted under this contract for each development. The Housing Agency shall make payment to USIG upon receipt of invoice. Invoice will be sent at the completion of our services.

7. **GENERAL RESPONSIBILITIES**: USIG shall be responsible for the professional quality and technical accuracy of all Inspection Reports furnished by USIG under this Agreement. The Housing Agency's review, approval, acceptance of, or payment for inspection services shall not be considered as a waiver of any rights under this Agreement or of any cause of action for damages caused by the Inspector's negligent performance under this Agreement. Furthermore, this Agreement does not restrict or limit any right or remedies otherwise afforded the Housing Agency or USIG by law.

8. The Housing Agency shall supply USIG a list of addresses to be inspected with property profiles and maps of each development (if available).

9. **OWNERSHIP OF DOCUMENTS**: All inspection forms and reports prepared under this Contract shall be the property of the Housing Agency and at termination or completion of services by USIG shall be promptly delivered by USIG to the Housing Agency.

10. **INSURANCE**: USIG shall carry Commercial or Comprehensive General Liability Insurance, and other insurances as required by law, all in amounts as set forth below. USIG shall furnish the Housing Agency Certificates of Insurance prior to the start of service. USIG states a ten-day notice of prior cancellations or change will be provided to the Housing Agency. Additionally, the Housing Agency shall be named as a Certificate Holder.

Insurance Limits or Amount
Commercial General Liability $2,000,000.00
Business Automobile Liability $1,000,000.00
Workers Compensation $1,000,000.00

REAC/NSPIRE Training Proposal

From: **Sales Team**
U.S. Inspection Group, Inc.
sales@usinspectiongroup.com

To: **Michael Threatt**
Sanford Housing Authority
mthreatt@sha-nc.org

January 7, 2024

REAC/NSPIRE Training

Proposal

U.S. Inspection Group, Inc
825 S. Church Street
PO Box 899
Murfreesboro, TN 37133

www.USInspectionGroup.com
p. 866.863.8744 (toll free)
f. 866.573.3280 (toll free)

Introduction

U.S. Inspection Group is pleased to submit this NSPIRE Training proposal.

Our training stands out from any you've experienced before—our unwavering objective is to transform you into a high performer! Furthermore, if necessary, we can also address NSPIRE-V (HQS Replacement) during this training.

Should you have any additional questions, please feel free to contact me toll free at 866/863-8744.

Key Considerations

- USIG has been conducting pre-REAC inspections & trainings for more than 20 years
- Finally beat REAC with our "Score Focused" training
- Our trainer was one of the first REAC trainers in the nation - Training 1000's of inspectors and housing agency's nationwide
- Well over 2 Million Units Inspected and 2,000+ happy clients

Fee Page

NSPIRE Training Fee	
Private Training Options (In-Person)	**Total**
1-Day 'Classroom' Training Session	$6,400.00
1-Day 'In-Field' Training Session	$6,400.00
2-Day 'Classroom and In-Field' Training Session *Best Value*	**$8,900.00**
Optional **Training Add-On** (Certification)	**Total**
NSPIRE STAR Certification (what is this?)	$149.00 / student
Private Online Training Option (Live Webinar)	**Total**
2 120-Minute Live Webinars (online training instead of in-person)	$4,400.00

Pricing Details

Our training is like no other - Once participants have completed USIG's training session, they will fully understand these new and challenging inspection standards called NSPIRE (or NSPIRE-V for HQS replacment).

The 1-Day "In-Field" training is ideal for smaller groups that really want to see how to apply the UPCS standards and how to set repair priorities to their actual properties.

Training prices are completely turnkey - includes travel (for in-person options), our exclusive NSPIRE guidebooks, REAC Priority Prep Cards, numerous handouts, basic competency test/certification *(this is not the NSPIRE STAR Certification), etc. for up to 40 participants ($90 per participant over 40).*

- $6,400 (1-day 'classroom' session)
- $6,400 (1-day 'in-field' session)
- $8,900 (2-day both 'classroom AND in-field' sessions)
- $4,400 (2 120-minute live webinars)
- $149 per person for NSPIRE STAR Certification (what is this?)

About Our Training

We've been offering REAC prep classes since the inception of REAC, training inspectors and housing agencies nationwide. Our exclusive training is designed to optimize your precious time. Whether you intend to conduct unit inspections with your in-house staff or outsource them, this training will empower your team to enhance your REAC score cost-effectively. The comprehensive program covers a detailed review of the ENTIRE NSPIRE protocol, coupled with a thorough examination of each inspectable area. Through the use of hundreds of real photos, our instructor will guide you on what to observe in EVERY part of your property.

Summary of Training:

Our instructor (one of the nation's first REAC Certified Instructors) will educate you on every aspect of the NSPIRE)...including year's worth of "tricks" and helpful tips on preparing for the REAC inspection.

Who should attend:

Everyone from the seasoned property manager to the newest maintenance mechanic

Items Provided (for each participant):

- *Exclusive* Inspection GuideBook - The industry's only field chart with easy to understand inspection standards for all 3 inspectable areas (including point values for every defect).

- REAC Priority Prep Card and Checklist - These will ensure you are focused on the most important defects prior to your REAC inspection.

- Proficiency Exam and Certificate (2-day class only) - Each participant that passes the Proficiency Exam will receive an NSPIRE Proficiency Certificate

- Hands-On Experience (in-field) - With the assistance of the staff we will inspect several building exteriors, systems, common areas and units. We will "put into practice" what we have learned regarding NSPIRE and setting proper priorities

AboutUS

Since 1998, U.S. Inspection Group, Inc. has been a trusted leader in REAC inspections and training, working with over 2,000 housing agencies, assessing more than 100,000 buildings, and inspecting over 2,000,000 units nationwide, all while **training tens of thousands** of housing staff members, including state and federal inspectors. With unparalleled expertise and a proven history of success, we set the benchmark for comprehensive and dependable inspections and trainings in the industry.

We pioneered the pre-REAC industry

We have earned our place at the top of the Pre-REAC field by delivering outstanding service at a fair price. Our commitment to quality and affordability ensures your property receives the expert attention it deserves without exceeding your budget.

Ken Pilbin President • NSPIRE Trainer

Ken, a founder of USIG, is the leading expert in both REAC protocols and the inspection business, with over two decades of unmatched experience. His in-depth knowledge and strategic approach have made him a trusted authority in the field. Beyond shaping the success of USIG's inspection services, Ken has taken his expertise nationwide, conducting training sessions to help others excel in REAC preparation. With his proven leadership and industry mastery, Ken has set the gold standard, solidifying his reputation as the best in the business.

Karen Howard General Manager

For over two decades, Karen has been expertly managing the operations of the USIG team. As the driving force behind scheduling over 5,000 apartment inspections each week, she ensures every detail is handled with precision and efficiency. Karen's leadership and organizational skills are essential to keeping our operations running smoothly, making her an indispensable part of our success.

Kim Koger Data Specialist

Meet Kim, the first official employee of USIG and a cornerstone of our team. With extensive experience in managing inspection reports and delivering exceptional customer service, Kim plays a vital role in ensuring our clients receive accurate and timely results. From organizing data to producing detailed reports, her dedication and expertise have been instrumental in building the trusted reputation of USIG. Kim's commitment to excellence makes her an indispensable part of our success.

Teresa Pilbin Accounting Manager

Teresa brings a wealth of experience to USIG as a highly skilled accountant with a background in managing finances for large corporations and non-profits. Her expertise in financial management and dedication to precision have been invaluable to our operations. At USIG, Teresa applies her extensive knowledge to ensure our financial processes run smoothly and efficiently, making her an integral part of our team.

Jaida Pecorari Staff Accountant

Jaida is a vital part of the USIG team, managing payroll, invoicing, and ensuring smooth financial operations for both inspections and training services. Her attention to detail and dedication keep everything running seamlessly. Fridays might mark payday, but they've also become a celebration of Jaida's hard work and indispensable contributions to the office

Alexis Feindel Client Coordinator

Alexis handles the complex responsibilities of contracts and scheduling with exceptional skill. Though she may be a newer face at USIG, she has quickly become an integral part of the team, managing paperwork and ensuring everything runs smoothly behind the scenes. Beyond her expertise in handling contracts, Alexis is known for her positive attitude and dedication, making her a standout not only for her work but for being an outstanding team member as well.

John Emery NSPIRE Trainer

Guru might be pushing it, but John is widely recognized as the foremost expert on REAC inspections and training in the country. As one of HUD's original Certified REAC Inspectors and Trainers, he has been a trusted resource for USIG and housing agencies nationwide. With decades of experience, starting in the '90s, John has an unparalleled understanding of REAC standards and protocols. He's also the author of our comprehensive REAC prep guidebooks, solidifying his position as the leading authority in the field. John's expertise makes him the top authority in REAC inspections, and we are fortunate to benefit from his knowledge

Sarah Curry Training Coordinator

Meet Sarah, our Training Coordinator, the driving force behind the success of our training sessions. With her organizational skills and deep knowledge, she simplifies the complexities of NSPIRE information, making it accessible and engaging. Sarah excels at multitasking, efficiently managing everything from shipping our renowned guidebooks to coordinating logistics for over 100 hotels for our NSPIRE training classes. Her attention to detail and ability to handle numerous responsibilities make her an essential part of our team.

Kenny Pilbin HCV Department Lead

Kenny, the talented son of Ken and Teresa, joined USIG after completing graduate school, taking on a leadership role in our HQS division. With a strong background and dedication, he's quickly made his mark within the company. As he takes on the challenges of managing the division, Kenny's focus and expertise continue to drive our success, and while the transition from college to professional life may come with its challenges, he's embracing the opportunity to grow and lead.

Experienced Inspectors Nation's Best

Meet our inspection team, a group of dedicated professionals committed to providing the highest quality inspections. With over 100,000 inspections each, our team brings unmatched experience and attention to detail to every job. Their thoroughness and expertise ensure that no issue goes unnoticed, and they consistently deliver accurate, reliable results. Trained to the highest standards, our inspectors are key to setting us apart in the industry, delivering exceptional service and making the inspection process as efficient and seamless as possible.

Sample Training Syllabus

2-Day Training Syllabus (most popular)

Welcome and Introduction	Day 1	9:00 - 9:15
NSPIRE(V) Overview	Day 1	9:15 - 10:15
Break	Day 1	10:15 - 10:30
Setting Repair Priorities	Day 1	10:30 - 11:15
- Outside Deficiencies (lecture and photo)	Day 1	11:15 - 12:00
Lunch	Day 1	12:00 - 1:00
- Outside Deficiencies - Continuted (lecture and photo)	Day 1	1:00 - 2:30
Break	Day 1	2:30 - 2:45
- Unit Deficiencies (lecture and photo)	Day 1	2:45 - 4:00
- Inside Deficiencies (lecture and photo)	Day 2	9:00 - 10:00
NSPIRE Compliance (Pre-REAC) Checklist	Day 2	10:00 - 10:30
Inspection Day Planning	Day 2	10:30 - 11:15
REAC Appeal Writting	Day 2	11:15 - 12:00
Lunch	Day 2	12:00 - 1:00
Hands-on inspection - In-Field	Day 2	1:00 - 3:00
NSPIRE Proficiency Exam (not NSPIRE STAR)	Day 2	3:00 - 4:00

1-Day 'Classroom' Training Syllabus

Welcome and Introduction	Day 1	8:30 - 8:45
NSPIRE(V) Overview	Day 1	8:45 - 10:00
Break	Day 1	10:00 - 10:15
Setting Repair Priorities	Day 1	10:15 - 10:45
- Outside Deficiencies (lecture and photo)	Day 1	10:45 - 12:00
Lunch	Day 1	12:00 - 1:00
- Unit Deficiencies (lecture and photo)	Day 1	1:00 - 2:15
- Inside Deficiencies (lecture and photo)	Day 1	2:15 - 2:45
Break	Day 1	2:45 - 3:00
NSPIRE Compliance (Pre-REAC) Checklist	Day 1	3:00 - 3:45
Inspection Day Planning	Day 1	3:45 - 4:30

Times are flexible

References

U.S. Inspection Group has trained 1000's of housing members from coast to coast for over 20 years!

The following is a very small number of our many satisfied clients

Housing Agency	Contact	Phone #	Email
DTN Management Company	Andrew Craft	517-371-5300	akraft@dtnmgt.com
TN NAHRO	Christi Billings	901-476-6135	covhouse@bellsouth.net
San Antonio HA, TX	John Stewart	210-477-6009	john_stewart@homesa.org
Salt Lake HA, UT	Lori Pacheco	801-284-4472	lpacheco@hacsl.org
GAHRA	Joe Wisniewski	706-724-5466	jwisniewski@augustapha.org
SERC NAHRO	Ailrick Young	601-425-4651	ayoung@laurelha.net
Allied Residential	Jedd McDaniel	253-230-9779	jmcdaniel@alliedresidential.com

"I've been to several training classes and this was by far the best I've ever attended."Mississippi NAHRO Maintenance Conference

"I've been in housing for 20 years and attended many, many classes. I have to tell you, this was easily the best I've ever attended" AHMA Conference

"Absolutely fabulous! I thoroughly enjoyed every minute and learned so much!"San Antonio TX Housing Authority

"I have to tell you, I have been to a lot of trainings over the years and yours was the most interesting, knowledgeable, and enjoyable training I have had the pleasure of attending." Idaho Regional Property Manager

"I feel the training was excellent. I think all maintenance personnel should have this training annually. I now feel we are headed in the right direction." Philadelphia PA Housing Authority

"My guys all said that it was the most useful training they had during the conference. If you don't mind, I am going to give your name and information to the chair of our Maintenance Conference that is held each April to possibly arrange a repeat of this session for that conference." KY NAHRO Annual Conference

"I have attended at least a dozen different REAC classes, but this is the best one ever"OR AHMA

"Your presentation was excellent! We will have you back to go through the same thing with the managers and assistants. The ENTIRE staff enjoyed, and learned, so much on these two days!" Harvest Management Group

"Thank you for administering such an informative workshop. I have gotten so much positive feedback from the participants on how much they learned at our training. They all feel like they are ready to take on any HUD REAC inspector at any time now. Thank you for building confidence with all of the training participants." Columbia SC Housing Authority

"I took your REAC class when you were here in Oregon recently. I would like you to know we just had four REAC inspections...here are the scores; 99,97,95 and 89. I could not have done this without your class. Your class gave us what we needed, so we could take care of the items that matter. Because of you class we didn't waste time." St. Vincent de Paul Affordable Housing

Forensic Audit Proposal-Risk Management Insurance

NCHARRP
North Carolina Housing Authorities Risk Retention Pool
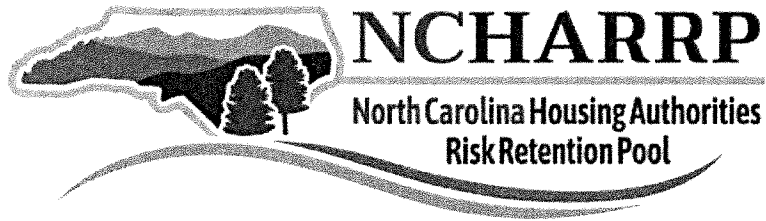
PUBLIC EMPLOYEE THEFT AND FORGERY DECLARATIONS PAGE

Named Insured and Mailing Address: **Policy No.** NCHARRP2025/62

    Sanford Housing Authority
    Post Office Box 636
    Sanford, NC 27331

Policy Term: From January 01, 2025 a.m. To January 01, 2026 am

In return for the payment of the premium, and subject to all the terms and conditions of this Coverage Document, we agree to provide you the coverage as stated in this Coverage Document.

Coverages	Limits of Liability	Deductible
Employee Theft - Per Loss Coverage	$300,000	$1,000

Forgery or Alteration

Date: January 21, 2025

Forensic Services

Submitted Electronically —Confidential
Forensic Investigation

This agreement constitutes a statement of work ("SOW") under the master service agreement ("MSA") dated January 21, 2025, or superseding MSA, made by and between CliftonLarsonAllen LLP (CLA, we, us, and our) and Sanford Housing Authority (you, your, or the entity). The purpose of this SOW is to outline certain services you wish us to perform in connection with that agreement.

The purpose of this SOW is to summarize our understanding of our engagement with you ("Sanford Housing Authority") in the above referenced matter. You have requested that we assist you with analysis and forensic accounting services with regard to this matter as you may direct.

We would also be prepared to provide testimony at deposition and trial should you decide that to be appropriate.

Appropriate CliftonLarsonAllen LLP (the "Firm") resources will be used on this engagement, as we deem necessary. Folashade Abiola-Banjac, Principal will be responsible for this engagement.

We will hold any documents or records provided to us concerning this matter subject to your direction with respect to possession and control. We will treat our work for you and any work papers we create about this matter as confidential. We will treat our work papers as privileged and confidential and will not disclose them to anyone unless required to do so by court order. We will immediately notify you of any requests or demand to inspect or copy either the documents in our possession or our work papers.

The scope of our engagement will be as determined through discussion with Sanford Housing Authority. The scope of the engagement is:

While our work may involve analysis of accounting records, our engagement does not include an audit in accordance with generally accepted auditing standards or any other attest function. It is our understanding that the primary intent of engaging our services is for the benefit of management of Sanford Housing Authority. Our services are not intended to benefit or influence any other person or entity.

Fraud and irregularities by their very nature are most often hidden, and no absolute assurance can be given that all such matters will be detected. Our engagement cannot be relied on to disclose all irregularities or

illegal acts, including fraud that may exist. However, we will inform you of any such matters that come to our attention.

Retention of Evidence and Property
Once the services in this engagement are no longer actively performed, CLA may be in possession of evidence and property supplied by you, forensic images and work product created as part of the engagement and hosted data. At the termination of this engagement, CLA will destroy the evidence and property supplied including forensic images and hosted data, or you may request to take possession of the evidence and property supplied, if so desired. Unless you request to take possession of the evidence and property supplied at the completion of the engagement, CLA is granted permission to dispose of the abandoned evidence, property and data in any manner it deems appropriate. At all times, you will bear the risk of loss with respect to all such data and property. You acknowledge that this may include loss of evidence and work product relevant to potential litigation. At no time will CLA be held liable for any loss of data incurred due to failure or damage of a hard drive or storage device or due to theft, fire, flood, or other casualty, or, to the extent permitted by law, any other reason except for CLA's gross negligence or willful misconduct.

Our responsibilities
If we issue a written report to you in connection with this engagement, you may not reproduce, distribute, or extract our report in whole or in part for any purpose other than this engagement without our express written permission. If we grant limited permission in this SOW or elsewhere and/or you reproduce or extract our report in whole or in part, we must approve the masters or printer's proofs of the reports we prepare before they are reproduced or published for distribution outside your management if the Firm's name is to be connected with the report in any way.

Fees
Our professional fees will be billed based on the time involved and the degree of responsibility and skills required. We will also bill for expenses (including travel, internal and administrative charges) plus a technology and client support fee of five percent (5%) of all professional fees billed. Please note that if an estimate is provided they are used for information purposes and cannot be relied on as a budget. CLA notes that estimates can change for varying reasons and they are to be used solely for informational purposes.

Staff Level	Rate per hour
Principal/Signing Director	$400 - $625
Director/Manager	$280 - $535
Senior	$200 - $300
Associate	$150 - $250

If this matter goes to trial or mediation, all fees, including estimated fees for expert witness testimony and completion of the engagement, must be paid in full before any testimony will be provided. This requirement may be waived if satisfactory arrangements are made in advance.

We do not anticipate any difficulties. However, in the unlikely event that there are any disagreements regarding our services, any claims against the Firm as a result of this engagement must be brought within one (1) year from the date our report is delivered or our work is completed.

We bill at our cost, direct expenses incurred during the course of the engagement.

We are certain that you recognize that it is difficult to estimate the amount of time that this engagement may require. The time involved depends upon the extent of our involvement and the nature of available information as well as developments that may occur as work progresses. It is our intention to work closely with you to structure our work so that it is appropriately and efficiently staffed.

All outstanding invoices must be paid in full prior to the release of any final reports to Sanford Housing Authority.

Estimates. Estimates are provided only for the accommodation of our clients and are not quotes. We cannot anticipate or control the amount of time required to properly complete the matters that we are retained to handle. For example, a client may ask us to perform tasks that do not require a CPA/forensic accountant's expertise and that are normally carried out by our clients themselves. Or the other party may take unexpected actions that result in a greater expenditure of our time than is ordinarily required. Many other factors, too numerous to describe, can have a similar effect. Accordingly, despite our desire to provide our clients with useful estimates, it is difficult to do so and our actual fees normally vary, in some cases considerably, from the estimates we provide.

In the event the Firm, its principals and employees are requested pursuant to subpoena or other legal process to produce its documents or appear in person relating to this engagement in judicial or administrative proceedings to which the Firm is not a party, Sanford Housing Authority shall reimburse the Firm at standard billing rates for its professional time and expenses, including reasonable attorney's fees, incurred in responding to such requests.

This SOW constitutes the entire agreement regarding services to be provided to you and supersedes all prior agreements, understandings, negotiations, and discussions between us, whether oral or written. This agreement may be supplemented by a replacement statement of work.

The Firm and Sanford Housing Authority mutually agree that both parties may execute this SOW electronically.

The Firm reserves the right to withdraw or stop work immediately on this engagement for one or more of the following reasons: (1) if fees or invoices, including any retainer that has not been paid as agreed; (2) if sufficient, relevant documentation, materials or information is not available, or has not been received to allow for an objective, appropriate work product to be produced under the professional standards; or (3) if you inhibit the application of our professional judgements in applying the best approach based on the available information. If the engagement is terminated prior to completion of the report, the Firm will bill for services rendered to the date of termination and the bill will be due upon presentation. Failure to make the payments required by this agreement, or failure by you to comply with the terms of this agreement give us the sole option to terminate the agreement.

Retainer

We require a retainer prior to commencing our work. The retainer will consist of $10,000.00, plus a technology and client service fee of 5% (for a total of $10,500.00). We will provide you with an invoice detailing this amount after the signed statement of work is received. The amount will be applied against our final billing. If the final billing is less than $10,500.00, the excess will be refunded. Note that the retainer is not intended to represent an estimate of the total cost of the work to be performed.

Right to Access

You warrant that you have lawful right to possess and utilize forensic analysis, eDiscovery and other services on the devices or data provided to us. You understand that our activities may can cause damage or disruption to vulnerable systems and that forensic analysis can subject any data recoverable on a device to disclosure. You therefore agree to indemnify, defend and hold CLA harmless for any claim arising out of damages, loss of productivity and unlawful possession or examination of the systems, devices or devices provided. Without limiting the foregoing, you agree to indemnify, defend and hold CLA (and its officers, directors, agents and employees) harmless from any and all losses, liabilities, suits, damages, claims, demands, and expenses (including, without limitation, reasonable attorneys' fees), whether based on contract or tort (including strict liability), resulting from a claim by a third party of improper access to the data or devices provided.

Limitation on remedies

Our role is strictly limited to the tasks and projects described in this SOW, and we offer no assurance as to the results or ultimate outcomes of this engagement or of any decisions that you may make based upon our communications with, or our reports to, you. You will be solely responsible for making all decisions concerning the contents of our communications and reports, for the adoption of any plans, and for implementing any plans you may develop, including any that we may discuss with you. CLA has no duty to ensure that the organization's accounting, billing, coding, compliance, or reimbursement practices, systems, or reports comply with applicable laws or regulations, all of which remain the organization's sole responsibility.

Non-Solicitation

To the extent permitted by law, you agree that during the term and for a period of one year after the expiration or termination date of the MSA, you will not solicit, hire, contract with, or engage the services of any person providing services to you on behalf of CLA without the prior written consent of CLA.

Indemnity

For the services described in this SOW, you agree to indemnify and hold harmless CLA, its successors and affiliates, officers, employees, and agents from any claims brought or asserted by any other person, third party, or governmental body for any loss, damages, liabilities, remedies, or cause of action, and from any reasonable expenses incurred in defending against any such claims or actions (including attorney fees) arising from or relating to the services performed by any CLA party.

Other

This agreement will remain in effect until it is terminated by either party on thirty (30) days written notice, with or without cause. In the event of termination, the terms of this agreement shall survive and remain in effect.

Agreement

We appreciate the opportunity to provide the services described in this SOW related to the MSA. All terms and provisions of the MSA shall apply to these services. If you agree with the terms of this SOW, please sign below to indicate your acknowledgement and understanding of, and agreement with, this SOW.

CLA
CliftonLarsonAllen LLP

ꝢAB

Folashade Abiola-Banjac, Principal
SIGNED 1/21/2025, 2:01:13 PM EST

Client
Sanford Housing Authority

SIGN: _____

Dr. Michael C. Threatt

DATE: _____

MSA Date: January 21, 2025

Master Services Agreement

This master service agreement ("MSA") documents the terms, objectives, and the nature and limitations of the services CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") will provide for Sanford Housing Authority ("you," or "your"). The terms of this MSA will apply to the initial and each subsequent statement of work ("SOW"), unless the MSA is changed in a communication that you and CLA both sign or is terminated as permitted herein.

1. **Scope of Professional Services**

    CLA will provide services as described in one or more SOW that will reference this MSA. The SOW will describe the scope of professional services; the nature, limitations, and responsibilities related to the specific services CLA will provide; and the fees for such services.

    If modifications or changes are required during CLA's performance of requested services, or if you request that we perform any additional services, we will provide you with a separate SOW for your signature. Such SOW will advise you of the additional fee and time required for such services to facilitate a clear understanding of the services.

    Our services cannot be relied upon to disclose all errors, fraud, or noncompliance with laws and regulations. Except as described in the scope of professional services section of this MSA or any applicable SOW, we have no responsibility to identify and communicate deficiencies in your internal controls as part of any services.

2. **Management responsibilities**

    You acknowledge and understand that our role is to provide the services identified in an SOW and that management, and any other parties engaging CLA, have responsibilities that are fundamental to our undertaking to perform the identified services.

3. **Fees and terms**

    See the applicable SOW for the fees for the services.

    Work may be suspended if your account becomes 60 days or more overdue and will not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagements will be deemed to have been completed even if we have not completed the services. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination.

Payments may be made utilizing checks, Bill.com, your online banking platform, CLA's electronic payment platform, or any other client-initiated payment method approved by CLA. CLA's electronic online bill pay platform claconnect.com/billpay accepts credit card and Automated Clearing House (ACH) payments. Instructions for you to make direct bank to bank wire transfers or ACH payments will be provided upon request.

4. **Other Fees**

You agree to compensate us for reasonable time and expenses, including time and expenses of outside legal counsel, we may incur in responding to a subpoena, a formal third-party request for records or information, or participating in a deposition or any other legal, regulatory, or other proceeding relating to services we provide pursuant to a SOW.

5. **Finance charges and collection expenses**

You agree that if any statement is not paid within 30 days from its billing date, the unpaid balance shall accrue interest at the monthly rate of one and one-quarter percent (1.25%), which is an annual percentage rate of 15%. In the event that any collection action is required to collect unpaid balances due us, reasonable attorney fees and expenses shall be recoverable.

6. **Dispute Resolution**

Any disagreement, controversy, or claim ("Dispute") that may arise out of any aspect of our services or relationship with you shall be submitted to non-binding mediation by written notice ("Mediation Notice") to the other party. In mediation, we will work with you to resolve any differences voluntarily with the aid of an impartial mediator.

The mediation will be conducted as specified by the mediator and agreed upon by the parties (i.e., you and CLA). The parties agree to discuss their differences in good faith and to attempt, with the assistance of the mediator, to reach an amicable resolution of the Dispute.

Each party will bear its own costs in the mediation. The fees and expenses of the mediator will be shared equally by the parties.

7. **Limitation of remedies**

These limitation of remedies provisions are not applicable for any audit or examination services provided to you.

Our role is strictly limited to the services described in an SOW, and we offer no assurance as to the results or ultimate outcomes of any services or of any decisions that you may make based on our communications with you. You agree that it is appropriate to limit the liability of CLA, its partners, principals, directors, officers, employees, and agents (each a "CLA party").

You further agree that you will not hold CLA or any other CLA party liable for any claim, cost, or damage, whether based on warranty, tort, contract, or other law, arising from or related to this MSA, the services provided under an SOW, the work product, or for any plans, actions, or results of an SOW, except to the extent authorized by this MSA. In no event shall any CLA party be liable to you

for any indirect, special, incidental, consequential, punitive, or exemplary damages, or for loss of profits or loss of goodwill, costs, or attorney fees.

The exclusive remedy available to you shall be the right to pursue claims for actual damages that are directly caused by acts or omissions that are breaches by a CLA party of our duties owed under this MSA and the specific SOW thereunder, but any recovery on any such claims shall not exceed the fees actually paid by you to CLA pursuant to the SOW that gives rise to the claim.

8. **Governing Laws, Jurisdiction, and Venue**
   The MSA is made under and shall be governed by the laws of the state of Minnesota, without giving effect to choice-of-law principles. This includes dispute resolution and limitation of remedies.

9. **Time limitations**
   The nature of our services makes it difficult, with the passage of time, to gather and present evidence that fully and fairly establishes the facts underlying any dispute that may arise between you and any CLA party. The parties (you and CLA) agree that, notwithstanding any statute or law of limitations that might otherwise apply to a dispute, including one arising out of this MSA or the services performed under an SOW, for breach of contract or fiduciary duty, tort, fraud, misrepresentation or any other cause of action or remedy, any action or legal proceeding by you against any CLA party must be commenced as provided below, or you shall be forever barred from commencing a lawsuit or obtaining any legal or equitable relief or recovery. An action to recover on a dispute shall be commenced within these periods ("Limitation Period"), which vary based on the services provided, and may be modified as described in the following paragraph:

Service	Time after the date we deliver the services or work product*
Tax Consulting Services	36 months
Tax Return Preparation	36 months
Examination, compilation, and preparation services related to prospective financial statements	12 months
Audit, review, examination, agreed-upon procedures, compilation, and preparation services other than those related to prospective financial information	24 months
All Other Services	12 months

* pursuant to the SOW on which the dispute is based

If the MSA is terminated or your ongoing relationship with CLA is terminated, then the applicable Limitation

Period is the lesser of the above periods or 12 months after termination of MSA or your ongoing relationship with CLA. The applicable Limitation Period applies and begins to run even if you have not suffered any damage or loss, or have not become aware of the existence or possible existence of a dispute.

10. **Confidentiality**

Except as permitted by the "Consent" section of this MSA, CLA will not disclose any of your confidential, proprietary, or privileged information to any person or party, unless you authorize us to do so, it is published or released by you, it becomes publicly known or available other than through disclosure by us, or disclosure is required by law, regulation, or professional standard. This confidentiality provision does not prohibit us from disclosing your information to one or more of our affiliated companies in order to provide services that you have requested from us or from any such affiliated company. Any such affiliated company shall be subject to the same restrictions on the use and disclosure of your information as apply to us. You also consent to our disclosure of information regarding the nature of services we provide to you to another independent network member of CLA Global, for the limited purpose of complying with professional obligations regarding independence and conflicts of interest.

The Internal Revenue Code contains a limited privilege for confidentiality of tax advice between you and our firm. In addition, the laws of some states likewise recognize a confidentiality privilege for some accountant-client communications. You understand that CLA makes no representation, warranty or promise, and offers no opinion with respect to the applicability of any confidentiality privilege to any information supplied or communications you have with us, and, to the extent that we follow instructions from you to withhold such information or communications in the face of a request from a third party (including a subpoena, summons or discovery demand in litigation), you agree to hold CLA harmless should the privilege be determined not to apply to particular information or communications.

The workpapers and files supporting the services we perform are the sole and exclusive property of CLA and constitute confidential and proprietary information. We do not provide access to our workpapers and files to you or anyone else in the normal course of business. Unless required by law or regulation to the contrary, we retain our workpapers and files in accordance with our record retention policy that typically provides for a retention period of seven years. After this period expires, our workpapers and files will be destroyed. Furthermore, physical deterioration or catastrophic events may shorten the time our records are available. The workpapers and files of our firm are not a substitute for your records.

Pursuant to authority given by law, regulation, or professional standards we may be requested to make certain workpapers and files available to a regulator for its regulatory oversight purposes. We will notify you of any such request, if permitted by law. Access to the requested workpapers and files will be provided to the regulator under the supervision of CLA personnel and at a location designated by our firm. Furthermore, upon request, we may provide copies of selected workpapers and files to such regulator. The regulator may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

11. **Other provisions**

You agree that CLA will not be assuming any fiduciary responsibility on your behalf during the course of this MSA, except as may be assumed in an SOW.

CLA may, at times, utilize external web applications to receive and process information from our clients; however, any sensitive data, including protected health information and personally identifiable information, must be redacted by you to the maximum extent possible prior to uploading the document or file. In the event that you are unable to remove or obscure all sensitive data, please contact us to discuss other potential options for transmitting the document or file.

CLA and certain owners of CLA are licensed by the California State Board of Accountancy. However, CLA has owners not licensed by the California State Board of Accountancy who may provide services under this MSA. If you have any questions regarding licensure of the personnel performing services under this MSA, please do not hesitate to contact us.

During the course of the engagement, there may be communication via fax or email. You are responsible to ensure that communications received by you or your personnel are secured and not shared with unauthorized individuals.

12. **Consent to use financial information**

We regularly aggregate anonymized client data and perform a variety of analyses using that aggregated data. Some of these analyses are published to clients or released publicly. However, we are always careful to preserve the confidentiality of the separate information that we obtain from each client, as required by the AICPA Code of Professional Conduct and various laws. Your acceptance of this MSA will serve as your consent to our use of Sanford Housing Authority anonymized data in performing and reporting on these cost comparison, performance indicator and/ or benchmarking analyses.

Unless authorized by law or the client consents, we cannot use a client's tax return information for purposes other than the preparation and filing of the client's tax return. By signing and dating this MSA, you authorize CLA to use any and all information furnished to CLA for or in connection with the preparation of the tax returns under this MSA, for a period of up to six (6) years from the date of this MSA, in connection with CLA's preparation of the types of reports described in the foregoing paragraph.

13. **Consent to send you publications and other materials**

For your convenience, CLA produces a variety of publications, hard copy and electronic, to keep you informed about pertinent business and personal financial issues. This includes published articles, invitations to upcoming seminars, webinars and webcasts, newsletters, surveys, and press releases. To determine whether these materials may be of interest to you, CLA will need to use your tax return information. Such tax information includes your name and address as well as the business and financial information you provided to us.

By signing and dating this MSA, you authorize CLA to use the information that you provide to CLA during the preparation of your tax returns to determine whether to offer you relevant materials. Your

consent is valid until further notice.

14. **Subcontractors**

CLA may, at times, use subcontractors to perform services under this MSA, and they may have access to your information and records. Any such subcontractors will be subject to the same restrictions on the use of such information and records as apply to CLA under this MSA.

15. **Technology**

CLA may, at times, use third-party software applications to perform services under this MSA. You acknowledge the software vendor may have access to your data.

16. **Termination of MSA**

This MSA shall continue for five years from January 21, 2025, unless terminated earlier by giving appropriate notice. Either party may terminate this MSA at any time by giving 30 days written notice to the other party.

Upon termination of the MSA, the provisions of this MSA shall continue to apply to all services rendered prior to termination.

17. **Agreement**

We appreciate the opportunity to be of service to you and believe this MSA accurately summarizes the significant terms of our relationship. This MSA, along with the applicable addendum(s) and SOW(s), constitute the entire agreement regarding services to be performed and supersedes all prior agreements (whether oral or written), understandings, negotiations, and discussions between you and CLA. If you have any questions, please let us know. If you agree with the terms of our relationship as described in this MSA, please sign, date, and return.

CliftonLarsonAllen LLP

Response:

This MSA correctly sets forth the understanding of Sanford Housing Authority.

CLA
CliftonLarsonAllen LLP

JAB

Folashade Abiola-Banjac, Principal
SIGNED 1/21/2025, 12:55:01 PM EST

Client
Sanford Housing Authority

SIGN: _____

Dr. Michael C. Threatt

DATE: _____

OPERATIONAL ASSESSMENT

AMA

Sanford Housing Authority

AMA

Dr. Michael C. Threatt
CEO
Sanford Housing Authority Inc
317 Chatham St
Sanford, NC 27330

December 20th, 2024

Proposal: Operational Assessment

Dear Dr. Threatt,

We are pleased to submit our proposal for "Operational Assessment" for the PH, HCV, and RAD/PBV programs of the Sanford Housing Authority (SHA). AMA Consulting Group, LLC (AMA) fully understands the critical importance of effectively managing government-subsidized programs. We are excited about the opportunity to leverage our expertise to enhance SHA operations and production, offering expert recommendations on training topics, areas for procedural improvement, and process development that contribute to organizational success.

Nationally recognized as a Minority, Women Owned Business Enterprise (MBE/WMBE), AMA stands out for diversity, innovation, and our unequivocal dedication to service excellence. With over 300 dedicated team members positioned throughout the United States, we bring a wealth of experience and broad perspectives to every project we undertake. Our team's industry experience and pioneering approach are our greatest asset, allowing us to offer unique solutions to agency challenges that drive performance and results.

With over 20 years' experience, our areas of expertise lie in managing and optimizing government subsidized and housing programs, with a focus on ensuring compliance with federal, state, and local regulations. We pride ourselves on providing advanced methodologies that enhance an organization's people and operational processes, ultimately supporting the success of our clients.

We believe our commitment to creating value and track record of success, makes us your ideal partner. We look forward to working together to achieve your goals and would be delighted to discuss this proposal in further detail. Please do not hesitate to contact **Jim Petersen, VP** who will personally serve as your point of contact. He can be reached via phone at (407) 707-9222 or by email at **Jim@amaconsultinggroup.com.**

Thank you for considering AMA Consulting Group, LLC for this opportunity. We are eager to bring our strengths to your challenges and play a significant role in the successful realization of your initiatives. We sincerely look forward to the opportunity to support in achieving your organizational goals.

Stephanie Rosario, CEO

AMA

Our 4Core Values

As we embark on our journey together, it is important to understand the foundation upon which AMA is established. Our core values are not simply principles, they are carefully selected standards, acting as a guiding light for our decisions and engagements. They are truly the embodiment of our daily operations. AMA's 4Core values are:

Integrity
- Upholding the highest ethical standards in all our actions.
- Building a solid foundation of trust with our clients and our team.
- Demonstrating reliability and credibility in every aspect of our work.
- Maintaining honesty and fostering trust in all our relationships.

Our commitment to integrity ensures that we serve your organization with honesty and transparency, fostering a partnership built on trust.

Ownership
- Taking responsibility and accountability for our actions.
- Being custodians of our collective success with care and determination.
- Committing to our goals and responsibilities, especially when faced with challenges.

Ownership is at the backbone of our service and gives assurance that AMA will uphold accountability in all we do, treating your goals as our own.

Results Driven
- Making empowered decisions that drive positive, impactful, solutions.
- Keeping the success of our clients as the primary objective.
- Stretching the limitations of what is possible to achieve excellence.

Being results-driven means, we not only produce deliverables, but also that we make an impact.

Service Excellence
- Exceeding expectations in every interaction.
- Going the extra mile by choice, not out of obligation.
- Creating positive, lasting impressions and meaningful outcomes.

We strive for unequivocal service excellence in every engagement.

Our commitment to you

AMA's commitment to our 4Core allows us to offer service that exceeds and goes beyond expectations. By embodying these values, we achieve mutual success and build a lasting, impactful relationship.

We look forward to the opportunity to demonstrate our commitment to these values as your potential partner. Let's achieve great success together.

Table of Contents

I. Firm Qualifications

Business Organization

Firm History

AMA Consulting Group LLC (AMA) was originally born from the reputable foundation of Annettie Machuca & Associates, Inc., established in 2008, and has evolved significantly since its restructuring in 2015. What began as a vision shared by five dedicated professionals has expanded into a dynamic force of over 300 employees, pioneering remote work from our Florida headquarters to various locations across the United States and Puerto Rico since 2009.

AMA's ascent to the forefront of the industry has not gone unnoticed. Our team stands as a beacon of service excellence, having introduced groundbreaking solutions that have touched the lives of thousands. As a certified Minority and Woman Owned Business Enterprise, our diversity goes far beyond just a corporate designation.

It extends through our executive team which consists of 55% minorities and 67% women. Additionally, our staff is comprised of more than 60% minorities and over 80% women. AMA stands out for diversity, innovation, and our unequivocal dedication to service excellence.

ORLANDO BUSINESS JOURNAL

Women Who Mean Business

STEPHANIE ROSARIO MACHUCA
CEO
AMA Consulting Group LLC. Lake Mary
Years in Position: 7

The results of this effort have been recognized by some of the country's most prestigious institutions. AMA has been renowned by Inc. Magazine as the fastest-growing government services company in the nation, topping the Inc. 5000 list, and also receiving their esteemed Best in Business Award.

The visionary behind AMA's remarkable journey is C.E.O. Stephanie Rosario, whose leadership has been pivotal in navigating the challenges of a global pandemic and national crisis.

Under Stephanie's stewardship, AMA has become a choice provider in consulting. Our team, comprised of leading subject matter experts with deep-seated knowledge of, and ongoing engagement with, the latest best practices. This collective proficiency, enriched by our diverse and experienced workforce, forms the backbone of our success. Our team's ability to draw from a rich tapestry of experiences ensures that we not only meet, but exceed our goals with integrity, accountability, high performance, and service excellence.

Looking ahead, AMA is poised for continued excellence. Our dedication to our clients and partners reflects our commitment to delivering services that are not just exceptional but transformative, making our clients the real heroes.

AMA

Firm Services

AMA Consulting Group LLC is a nationally distinguished Minority Business Enterprise (MBE) and Woman-Owned Minority Business Enterprise (WMBE) headquartered in the heart of Central Florida. We are a collective of enthusiastic subject matter experts, unified by a common goal of creating a better way to advance people and performance. Our mission is clear – *to create opportunities for growth, in public/private collaborations, to advance people, technology, and performance*.

AMA CORE VALUES
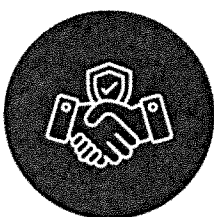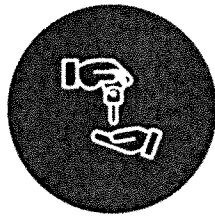
INTEGRITY OWNERSHIP RESULTS EXCELLENCE
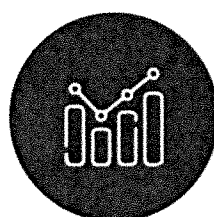
AMA SPECIALIZATIONS

Program Management & Compliance: (HCV, PH, LIHTC, PBV, HOME, RAD, TAX CREDIT, SECTION 8)

→ Income / Eligibility Determinations and Recertifications
→ Compliance for Low-Income Housing Tax Credit
→ Quality control and dashboard tracking systems
→ Performance Monitoring

→ Property Management & Maintenance
→ Housing Choice Voucher / Public Housing
→ Emergency Rental Assistance / Eviction Prevention Programs

Professional Services:

→ Executive Leadership & Staff Augmentation
→ Professional and Program Training
→ Customer Experience/Call Center Operations
→ Strategic Planning
→ Policy Development
→ Process Development / SOPs
→ Admin, ACOP, Manual, Plan of Action, 5-year plan drafting

→ HCV & PH Operational & Financial Assessments/Management
→ Audit Preparedness & Response
→ Crisis Response / Recovery Response
→ Data analytics, Key Performance measurements, dashboards & scorecards

Systems Expertise

AMA offers a proven record of success optimizing operations by systematically analyzing and refining processes, ensuring they align with organizational objectives, and educating/training teams to ensure agreement and compliance. Our experience has led us to proficiency with a variety of operating systems, including Yardi Software & Rent Cafe.

AMA

Organizational Chart

AMA is pleased to present our organizational chart, highlighting our principal officers and their roles. This chart reflects our commitment to transparency and effective leadership within the company.

EXECUTIVE TEAM

Stephanie Rosario-Smith
PRESIDENT & CEO

Barry Katz
CFO

Jim Petersen
VP OF SALES

Christina Quiñones
SENIOR VICE PRESIDENT

Nick Stoneburner
INFORMATION TECHNOLOGY (IT)
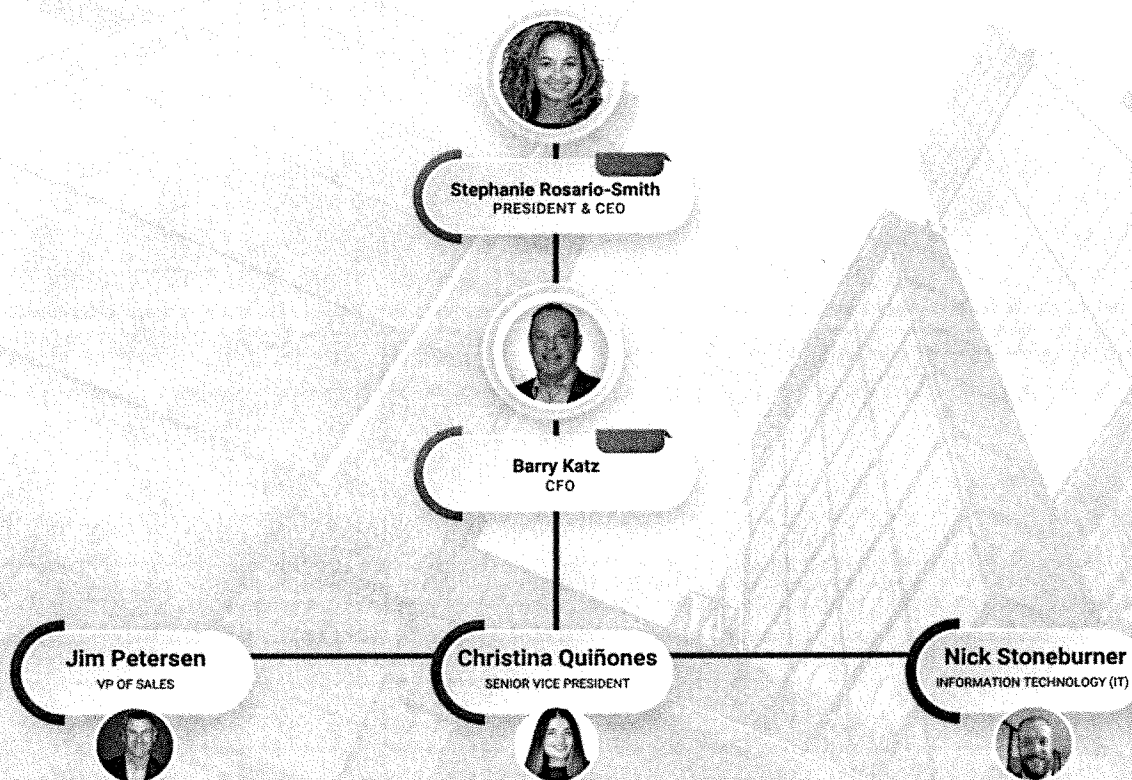
Project Management

To effectively manage the complexity and dynamics of handling multiple projects at once, AMA deploys an exclusive strategy to define operations. This strategy is built upon a foundation of robust infrastructure, advanced project management principles, cutting-edge technology, and a deep understanding of the unique needs of each project. Our operations framework is designed to optimize efficiency and ensure that resources are allocated effectively across all initiatives to meet project timelines and exceed objectives.

Our comprehensive operations strategy addresses the complexity and the dynamic nature of managing multiple projects concurrently. This strategy is built on a corporate-wide foundation of advanced management principles, cutting-edge technology, and a deep understanding of the unique needs of each project. Our operations framework is designed to optimize efficiency, ensuring that resources are allocated effectively across all initiatives to meet or exceed project timelines and objectives.

We have developed a robust infrastructure that supports our team's ability to seamlessly integrate new projects, such as those for the SHA, into our workflow. Our confidence in this infrastructure is grounded in a proven track record of successfully managing and delivering a diverse range of projects on time and to the highest standards.

Our operations model encompasses the following key components:

Strategic Resource Mapping

We employ a sophisticated resource management system that allows us to deploy our experts and assets where they are most needed, ensuring every project has access to quality skills and depth of knowledge at the right time.

Scalable Solutions

Our operational infrastructure is inherently scalable, enabling us to adjust our capacity and capabilities in response to the demands of our project portfolio. This flexibility ensures we can expand resources and enhance services to match the scope and scale of each project. We turn sudden changes and unexpected challenges into new opportunities.

Technological Integration

We utilize state-of-the-art technologies and applications to streamline project oversight, communications, and collaboration. This means leveraging cutting edge project management tools and data analytics platforms, enhancing our ability to monitor progress, manage risks, and ensure seamless coordination across teams and projects.

Process Optimization

A culture of continuous improvement is at the core of our organization. By regularly analyzing our workflows and processes, we identify areas for development, implementing best practices that drive efficiency and improve outcomes. This commitment to optimization ensures our operations remain agile and responsive to the evolving needs of our clients.

Expert Team Collaboration

A culture of continuous improvement is at the core of our organization. By regularly analyzing our workflows and processes, we identify areas for development, implementing best practices that drive efficiency and improve outcomes. This commitment to optimization ensures our operations remain agile and responsive to the evolving needs of our clients.

Quality Control

Rigorous risk management and quality assurance protocols are integral to our operations model. By proactively identifying potential issues and implementing control measures, we minimize disruptions and ensure that each project meets our stringent standards for quality and excellence.

AMA

Personnel Profiles

The selection of the team tasked with leading and managing service delivery for your project is a strategic process. This approach is firmly rooted in matching our expertise with your organization's unique needs and objectives. We begin by analyzing the project scope and challenges, then match these requirements with team members who not only have the right skillset and professional background, but also shares a passion for your mission. This selection process is further refined through an assessment of team dynamics, ensuring there is synergy within the assigned group to foster innovation, efficiency, and exceptional outcomes.

By prioritizing a blend of technical proficiency, collaborative spirit, and a commitment to service excellence, we ensure that our leadership and management teams are poised to deliver unparalleled service to our clients. We understand the complexities and demands of the housing sector and are prepared to leverage our insights and expertise to ensure the success of our partnership with SHA. We have carefully selected a dedicated management team comprising of individuals recognized for their proficiency, dedication, and innovative approaches.

Your management team proposed to oversee this project includes the following key personnel:

TEAM MEMBER	AREA OF SPECIALIZATION	CONTRIBUTION
Stefan Gilliam **Account Manager**	• **10+ Years Experience** • Workflow Optimization • Training • Strategy Development and Deployment • Reporting • Accuracy Strategy • Data Management and Analysis • Partnership Development and Engagement	• Performance Monitoring • Workflow Analysis • Technical Assistance and Training • Program Evaluation and Impact Assessment • Technology and Systems Optimization

TEAM MEMBER	AREA OF SPECIALIZATION	CONTRIBUTION
Ronnie Odom Consultant	• **35+ Years Experience** • HCV and Public Housing Administration • Technical Assistance and Training • Process Mapping • Workflow Optimization • Training • Rental Integrity Monitoring • SEMAP, LIHTC, RAD • Workflow Analysis • Corporate Document Drafting	• Strategy Development and Deployment • Reporting • Program Advisement • Accuracy Strategy • Performance Monitoring • Document Drafting • Technical Advisement

TEAM MEMBER	AREA OF SPECIALIZATION	CONTRIBUTION
Jason Walker Consultant	**10+ Years Experience** - Project Management - System Integrations - Training - Process Mapping - Program Advising - Technical Advisement	- Project Management - Business Development & Outreach - Vision Adherence - Cross Functional Collaboration
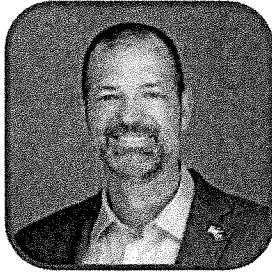
AMA

II. Firm Experience

Relevant Experience: Case Studies

AMA Consulting Group is renowned for delivering exceptional consulting services to government and housing agencies. We specialize in policy and procedure development, aligning with industry best practices, and enhancing agency efficiency. To showcase our experience and the positive impact we've had on government operations, we present the following case studies that highlight our successful projects.

Jackson Housing Authority

HCV operational assessment. Task based technical operations consulting,   **Jun.2022 to Jun.2023**
Annual recertifications, HCV recertifications, Quality control

Contact:	Bridgetta Mac-Rizzo
Address	3300 N 7th St. Murphysboro IL 62966
Telephone:	618-684-3183
Email:	Bmac-rizzo@jcha-il.org
Summary:	AMA Consulting Group delivered comprehensive operational and compliance support to the Jackson County Housing Authority (JCHA), with a strong emphasis on **operational assessment** as a foundational step. This initial agency health check involved detailed staff interviews, document evaluations, analysis of current staffing and organizational structures, and thorough assessments of existing operations, workflows, procedures, and the Administrative Plan.

To enhance the operations of JCHA's Housing Choice Voucher (HCV) and Public Housing Programs, our AMA consultants engaged in several supportive activities. We facilitated multiple process mapping sessions to define and streamline key program processes. Additionally, we developed a Standard Operating Procedures (SOP) Manual, created job descriptions and Key Performance Indicators (KPIs) for staff roles, and conducted evaluations of program staff for behavioral and cognitive alignment with their roles using the Predictive Index. Targeted staff training was also implemented to address areas of opportunity and mitigate high-risk factors.

AMA executed remote compliance reviews of tenant files using our proprietary software, AMAzing QC. This involved conducting transactional reviews for annual and interim recertifications, rental increases, terminations, and portability billing. Through AMAzing QC, we developed customized Quality Control checklists based on JCHA's administrative policies and procedures, ensuring thorough and tailored compliance checks.

In addition to these services, AMA provided interim management support for JCHA's HCV Program during their recruitment process for a new Program Manager. This role included day-to-day oversight of program staff and their performance, along with the responsibility of preparing program reports, including PIC, VMS, and monthly board reports.

Furthermore, AMA compiled a compliance manual designed to guide JCHA through the operational upgrades, ensuring continued adherence to regulatory standards and best practices. This manual serves as a vital reference tool for ongoing compliance and operational efficiency, reinforcing our commitment to enhancing JCHA's capabilities.

AMA

Housing Authority of Racine County
HCV Operational Assessment, Task-based case management
Waitlist management, Remote annual recertifications   **Sep.2022 to Sep.2023**

Contact:	Deb Madsen
Address	837 Main St. Racine WI 53403
Telephone:	262-636-3417
Email:	dmadsen@rcha.org

Summary: AMA Consulting Group was contracted to perform a comprehensive **operational assessment** of the Housing Choice Voucher (HCV) program. This in-depth evaluation was designed to enhance operational efficiency and ensure compliance with regulatory standards across the department. Our assessment process involved several critical steps, including virtual discussions with staff members to gather insights into current practices, challenges, and opportunities for improvement. We meticulously scrutinized relevant documents to identify gaps in processes and ensure alignment with best practices. Additionally, we analyzed the existing staffing and organizational structures to understand how they impacted program delivery and operational efficiency. A detailed review of current operations and workflows was conducted, focusing on procedural adherence and identifying areas for streamlining. We also assessed the Administrative Plan to ensure it met the needs of the program and complied with regulatory requirements. To conclude the assessment, we carried out quality control evaluations on 50 remote family files, ensuring that documentation was accurate and consistent with program guidelines.

Following the operational assessment, AMA managed the remote annual recertifications for participants in the HCV program. Our responsibilities included creating detailed file notes to ensure that all necessary information was accurately documented, conducting in-depth interviews with families to gather essential information and assess their current circumstances, and handling all forms of communication with families to ensure clarity and responsiveness throughout the recertification process. We also implemented robust measures to ensure the secure transmission of sensitive data, safeguarding participant information.

In addition to these services, AMA provided detailed management services related to the waiting lists and eligibility/admissions processes of the program. Our work involved systematically removing outdated entries from the waiting list to maintain its accuracy, managing the periodic opening and closing of the waiting list, and organizing it according to predetermined preferences to facilitate fair and efficient candidate selection. We meticulously selected candidates from the waiting list based on eligibility criteria and program requirements, and we oversaw the briefing sessions for selected candidates while ensuring the efficient distribution of vouchers.

Through these comprehensive services, AMA aimed to improve the effectiveness and significantly enhance the efficiency of admissions and waiting list management within the HCV program. Our efforts have led to a more streamlined operation, ultimately benefiting both the agency and its participants.

Success Stories

Nationally renowned for developing policies, procedures, and best practices for housing programs, our firm consistently demonstrates success through a robust portfolio of past achievements. As a full-service consulting entity, we provide expert guidance and support throughout the country. Below highlights our ability to deliver results that meet and exceed expectations in a variety of contexts and challenges.

- ❖ Innovating program approaches and designs demonstrated by the guidance and effort our team members had with the Indianapolis Housing Agency and Tampa Housing Authority. Our team worked with agency officials to initiate a *customer service operation* and completely *re-engineer the HCV Program* from a case management approach to a functional, "task-based" system adding various efficiencies.

- ❖ Enhancing quality control initiatives as demonstrated with the Municipality of Caguas where our team successfully *re-engineered HCV operations* while improving efficiencies, reducing administrative costs, and aiding the *successful closure of a HUD corrective action plan*.

- ❖ Designing, developing, and implementing program policies and procedures for government agencies in the cities of Chicago and Washington D.C. Our teams composed and amended administrative plans and implemented a *first-of-its-kind Moving-To-Work (MTW)* initiative for these agencies.

- ❖ Providing *top-ranked, bilingual, industry trainers* for HUD's Housing Choice Voucher Program, Public Housing Program, ERAP such as projects with Cincinnati Metropolitan, Lakeland Housing, and State of New Jersey.

- ❖ Supporting and guiding successful *software conversions and data conversions* for a housing authority in the City of San Francisco. Here AMA teams improved the PIC reporting rate from 80% to 100%, implemented a customized VMS software to identify proper and improper subsidy allocations and led initiatives to recover overpaid subsidy on behalf of the housing authority.

- ❖ Preparing and *implementing plans for transition to remote and hybrid operations* for the Municipality of Trujillo Alto. This allowed the agency a level of flexibility and agility and proved beneficial as COVID-19 undertook the area. Their agency was able to provide continued service in a safe manner regardless of the state of Emergency with COVID-19.

- ❖ Implemented a *remote customer service call center* for a government agency in Miami Dade, *increasing accessibility* to excellent program support for their constituents. Our team also provided eligibility processing services as needed to ensure their clients continued to be met timely and efficiently.

- ❖ Disbursed funds to fire departments, hospitals, and other government agencies facing deficits due to the COVID-19 pandemic. We've processed applications for expenses such as personnel overtime, personal protective equipment (PPE), and additional salaries. AMA has *distributed over $2.5 million to more than 100 different agencies* through the COVID-19 Relief of Funds (CRF) program in 2020-2021 on behalf of the state of South Carolina.

We are always identifying key takeaways from every experience, indispensable for the growth and evolution of our company. They serve as a foundation for continuous improvement, guiding us in refining our strategies. Embracing these insights allows AMA to adapt to changing market dynamics, innovate more effectively, and strengthen our commitment to excellence.

AMA

III. Approach to Scope

Scope of Work

AMA understands the Sanford Housing Authority (SHA) is seeking a proposal for "Operational Assessment". We are confident the talent and experience showcased over the following pages will highlight how our teams will provide your agency with exceptional service. AMA regularly exceeds industry best practices, while staying current with policy, regulations, and industry shifts.

We leverage a variety of technologies, tools, and innovative resources which have revolutionized Public Housing and HCV practices. The comprehensive recommendations and solution within this proposal introduces a streamlined and efficient process, with several benefits to SHA programs, its participants, landlords, and the internal PH, HCV, and RAD/PBV management team as a whole. Consider the following:

1. **Centralized Data Management:** AMA utilizes custom methodologies for leveraging onsite tracking systems, which serves as a centralized hub for all PH and HCV (including RAD/PBV) transactions and recertifications data. Our systematic processing approach consolidates information from various sources, ensuring that all relevant details for transactions are readily accessible within the database. This method of centralized data management eliminates the need for manual searching and cross-referencing, saving time and reducing risk.

2. **Advanced Automations:** A key feature of our technique is how AMA is maximizing the use of automation technology. For both PH and HCV programs, this means configuring available platforms to trigger customized communications, manage calendars and priority events, and coordinate annual recertifications, inspections, etc. Employing automation ensures necessary actions are taken promptly, maximizes compliance, and reduces user error and the likelihood of delays.

3. **Standardized Operational Workflows:** We recognize that flexibility is paramount for PHAs. Unique to AMA is our ability to incorporate standards that maximize staff productivity and flexibility into programs. Employing a series of customized workflows tailored to the specific needs of the SHA, we are able to reflect the unique steps and approval processes needed to ensure high performance, operational transparency, and alignment within agency systems.

4. **Staff Training and Support:** Optimizing agency operations includes providing ongoing support to SHA teams. AMA provides ongoing training, development, team building, and support to ensure new methods are fully embraced resulting in better workflows, processes, and procedures. Additionally, our experts provide systems training, including instruction on transaction activities, compliance tracking, and general integrations to enhance efficiency and improve accuracy.

5. **Scalability and Growth:** AMA's approach to corporate scale ensures our clients can expand their capacity quickly with little downtime and no loss. Our teams implement scale ups swiftly, exceptionally fulfilling the needs of each project. The application of this agile framework in rapid scalability, ensures uninterrupted services, overcoming any challenges that may arise.

Approach to Scope

Our AMA associates have provided services for organizations across the country similar to those requested by the Sanford Housing Authority (SHA). Our teams stay current with industry best practices, as well as applicable codes, laws, and regulations. We are confident that our talent and experience will allow us to provide your council with exceptional service.

To meet the needs of the SHA, we propose the following scope of work to be performed throughout the duration of the contracted period:

Kickoff Conference

Within 3 business days from retainer receipt, AMA and SHA stakeholders will participate in a remote kickoff conference to initiate our planning sessions. During this meeting, AMA will introduce your assigned team, review the scope of services, and discuss key elements such as division of responsibilities, contractual obligations, deliverables, and reporting requirements. The primary objective will be to gain insight into and establish agreement on SHA's goals and objectives concerning the following

- Current areas of concern, dissatisfaction, or frustration from the SHA with regard to current operations, systems, and/or personnel
- Operational workflows, management systems, software utilized, and program performance
- Exchange of Admin Plan, ACOP, Policy Manual, relevant SOP's, and all other necessary documents and systems access for review and analysis
- SHA general responsibilities and assumptions

Step 1: Remote Data Collection and Discovery

AMA consultants will initiate the data collection phase with an extensive engagement involving interviews with staff at multiple levels across the HCV and Public Housing programs and special programs. This process aims to thoroughly understand the organization's current operations and performance. These interviews will collect qualitative insights into daily workflows, challenges encountered, and the effectiveness of existing procedures. By interacting directly with staff, consultants can identify knowledge gaps, procedural inconsistencies, and areas of opportunity for targeted training, all of which are critical for strengthening operational success.

This comprehensive evaluation will focus on several key data points. Key operational metrics such as efficiency rates, turnaround times for crucial processes, and customer satisfaction levels will be analyzed to assess the organization's performance. These quantitative measures are essential for pinpointing potential areas for improvement. Additionally, workforce analytics—including staffing levels, productivity measures, and employee engagement scores—will be evaluated to gain insights into human capital management. Understanding these dynamics is vital for optimizing workforce productivity and satisfaction, ultimately enhancing the overall effectiveness of the organization.

Additionally, consultants will undertake a thorough review of SHA's Admin Plan, ACOP, and relevant documents, identifying areas for recommendation and improvement. This qualitative feedback will be augmented with process documentation and workflow analyses to pinpoint inefficiencies, bottlenecks, or redundancies in the current procedures. The data and discovery efforts will extend to evaluating the role of technology within SHA operations. This includes analyzing how existing systems and structures support or hinder operational efficiency and identifying technological shortcomings or improvement areas.

Collectively, these data points form a foundational basis for a thorough analysis, enabling the identification of strengths, weaknesses, and opportunities for strategic enhancements.

Overall, these methodologies will equip AMA consultants with a detailed understanding of both the metrics and the human factors influencing the SHA's performance, paving the way for informed recommendations and strategic improvements, and pinpoint areas requiring further assessment during the onsite visit.

Step 2: Onsite Operational Efficiency Assessment

AMA consultant and specialist will conduct a comprehensive remote operational assessment to thoroughly evaluate SHA's workflows, environment, and performance within the agency. This step is designed to offer consultants an in-depth understanding of the operational dynamics by observing staff in their actual work process. The primary objective will be to evaluate the balance between workload, staffing capacity and staff knowledge, as well as to assess operational efficiency. During these interactions, our team will work closely with SHA personnel to map out critical processes, identify inefficiencies such as bottlenecks and redundancies, and uncover opportunities for enhancing overall efficiency. Observing operations and conducting detailed interviews with staff will be essential for gaining insights into the practical application of policies and procedures in day-to-day activities. This approach will enable our consultants to provide tailored recommendations for optimizing staffing levels and improving operational effectiveness.

Our consultants will review existing management methods, focusing on their effectiveness and impact on productivity. By analyzing management strategies and their direct influence on operational efficiency, we aim to identify practices that either enhance or hinder voucher issuance

This targeted evaluation will uncover areas where management adjustments can significantly improve productivity and reduce turnaround times, ultimately optimizing resource utilization and enhancing tenant satisfaction.

During the operational observation, AMA will conduct a comprehensive review of a sampling of selected files across the 731 HCVs, 270 PH, 176 RAD/PBV, and 5 Supportive PBV tenants. The purpose of this review is to thoroughly assess the current state and condition of these files. By doing so, AMA aims to gain a deeper understanding of the operational processes and how they may influence overall productivity. Additionally, this review will serve as a means to evaluate staff proficiency and their understanding of assigned tasks. The insights gathered from this review will be instrumental in identifying potential areas for training improvement and ensuring that operational efficiencies are optimized.

Step 3: Information Consolidation: AMA consultants will compile insights and findings from both data gathering and operational assessment activities to develop a thorough understanding of the current operational status while identifying clear areas for actionable improvements and training opportunities. This analysis will rigorously categorize insights into operational hurdles, workload distribution, and employee recommendations for enhancements, as well as pinpoint inefficiencies or potential areas for optimization and targeted training.

• Data Aggregation

Collect Data: Gather all data, observations, and findings from the onsite and remote operational assessments, including interview notes, survey responses, operational data, process maps, and review of documents and systems.

• Cross Reference Findings

Cross-reference observational data from the onsite assessment and document review findings to validate insights and ensure consistency. Look for correlations between different data sets to identify root causes of issues and areas of strength.

• Qualitative/ Quantitative Analysis

Analyze interview notes and open-ended survey responses to identify themes, sentiments, and qualitative insights into the organization's operations, culture, and challenges and identify trends, patterns, and outliers.

• Consolidate Insights

Collate insights from qualitative and quantitative analysis to form a holistic view of the organization's operational health. Identify and highlight the most critical insights, including areas of strength, challenges, and opportunities for improvement.

Throughout this process, our consultants will integrate industry best practices to ensure that the organization aligns with top-performing standards in the sector. We will conduct a detailed analysis of staffing structures and workload capacities, comparing them against HUD standards to ensure compliance and identify any existing discrepancies. This evaluation will not only aim to align with regulatory requirements but will also focus on optimizing staff deployment to enhance efficiency and effectiveness. By thoroughly assessing how staffing levels and configurations handle current workloads, the consultants can pinpoint opportunities for reorganization that improve operational productivity and overall workplace efficiency.

This comprehensive analysis is essential for understanding the existing operational framework and precisely identifying areas where restructuring, and training could significantly enhance efficiency, productivity, and overall staff morale. By incorporating industry best practices and adhering to HUD standards, the organization can ensure it not only meets regulatory expectations but also operates at peak performance levels.

AMA

Step 4: Report Drafting & Recommendations

Following the completion of the above designated phases, AMA will prepare an exhaustive report that encapsulates findings and recommendations regarding training opportunities or workflow streamlining derived from our operational assessment of SHA. This document will overview compliance issues, operational procedures, and pertinent KPIs. It aims to accentuate SHA's operational strengths, spotlight potential concerns, and unveil opportunities for strategic enhancements. The recommendations will traverse a broad spectrum of areas, laying the groundwork for informed decisions regarding staff restructuring, training and operational optimization.

Upon finalizing our report, AMA consultants will arrange a remote meeting with SHA's designated stakeholders to review the recommendations report in detail. Depending on SHA's immediate needs, as identified during our assessment, AMA will prepare a proposal that outlines timetables, costs, and resources required for each suggested solution. SHA is not obligated to accept the suggestions or proposals at the conclusion of the initial agency assessment.

Workplan Timeline
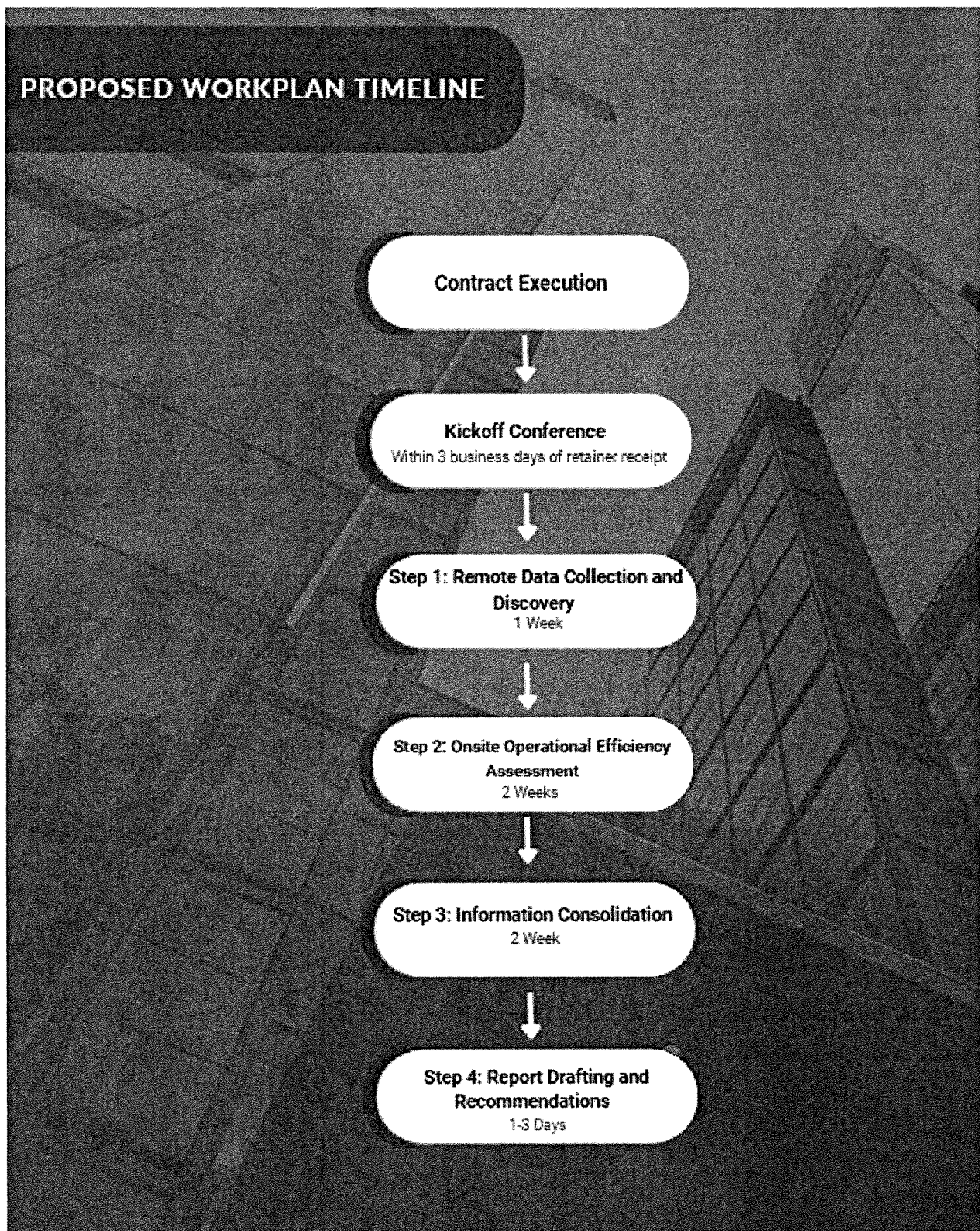
PROPOSED WORKPLAN TIMELINE

Contract Execution

Kickoff Conference
Within 3 business days of retainer receipt

Step 1: Remote Data Collection and Discovery
1 Week

Step 2: Onsite Operational Efficiency Assessment
2 Weeks

Step 3: Information Consolidation
2 Week

Step 4: Report Drafting and Recommendations
1-3 Days

IV. Project Price

Estimated Project Investment

AMA will invoice the Sanford Housing Authority for the services listed above according to the fee schedule listed below.

<u>Support Services</u>

Service	Fee
Operational Assessment – HCV, PH + RAD/PBV Programs	$48,876

*** Pricing includes travel*

<u>Statement of Validity</u>
This scope of services and investment summary is valid until the proposal has been accepted, but not to exceed fifteen (15) calendar days from this proposal date.

<u>Contract</u>
AMA Consulting Group, LLC standard contract is attached as Exhibit A for agency review. Upon signature of this Scope of Work, AMA will send a completed contract to the Sanford Housing Authority for signature. **Work will not begin until contract is executed.**

Unless otherwise agreed in writing, Sanford Housing Authority shall pay AMA as follows: AMA will invoice monthly in arrears for the time and materials provided in the contract, including any agreed upon reimbursable expenses. Payment is due within fifteen (15) days of the date of the invoice. AMA will collect a retainer of $2,500, **to be applied to the final invoice**, for work total to begin work.

AMA

Proposal Acceptance

The undersigned acknowledge that they are duly authorized to enter into this Agreement for their respective parties.

By signing below, the Sanford Housing Authority agrees to the terms of this proposal.

_____	_____	_____
Authorized Signature	Printed Name	Date

To accept, please return proposal, by postal mail or email:
Mailing Address: AMA Consulting Group, LLC, P.O. Box 950445 Lake Mary FL 32795
Email: jim@amaconsultinggroup.com

EOC Policy Statement

AMA is an equal-opportunity employer. In accordance with anti-discrimination laws, AMA prohibits discrimination and harassment of any type and affords equal employment opportunities to associates and applicants without regard to race, color, religion, sex, sexual orientation, gender identity or expression, pregnancy, age, national origin, disability status, genetic information, protected veteran status, or any other characteristic protected by law. AMA Consulting Group conforms to the spirit and letter of all applicable laws and regulations.

The policy of equal employment opportunity (EEO) and anti-discrimination applies to all aspects of the relationship between AMA and its associates, including:

→ Recruitment
→ Employment
→ Promotion

→ Transfer
→ Training
→ Working Conditions

→ Working Conditions
→ Wages and Salary Administrations
→ Associates Benefits and Application of Policies

The policies and principles of EEO also apply to the selection and treatment of independent contractors, personnel working on our premises who are employed by temporary agencies, and any other persons doing business for or with AMA Consulting Group.

Violations of this policy, regardless of whether an actual law has been violated, will not be tolerated. AMA will promptly, thoroughly, and fairly investigate every issue that is brought to its attention in this area and will take disciplinary action, when appropriate, up to and including termination of employment.

Diversity Statement

AMA Consulting Group, LLC is proud a Woman and Minority owned business. AMA is dedicated to creating diverse opportunities and an embracing business environment. We recognize the value that diversity brings to our organization and are continually engaging with a variety of backgrounds within our associates. Our commitment to inclusion is integral to our overall mission in developing potential, driving innovation, and building stronger and more resilient teams.

AMA understands the importance of promoting equity in contracting. If awarded the contract to provide "Operational Assessment" services for the Sanford Housing Authority (SHA), when necessary to solicit third-party services, AMA will consider partnering with businesses that offer diversity classifications first. By making diversity a priority, AMA and SHA can help promote equity in contracting and making a positive impact in the community. AMA will give preferential treatment to diverse business classifications such as Section 3, MBE, WBE, VOBE, SDB, and SDVOBE.

Firm Recognition

AMA has received numerous accolades, showcasing our outstanding performance as consultants in affordable housing. Below are just a few highlights of our success over the recent years, underscoring our commitment to excellence. Each recognition serves as a testament to the hard work and dedication of our team. Through innovation, quality service, and leadership, we have distinguished ourselves among our peers. This success reflects our ongoing commitment to not only meet but exceed industry standards.

Each day, Stephanie Rosario- works with organizations at multiple levels in the hopes of improving people's lives, such as when her woman-owned business helped 40,000 families avoid eviction during the COVID-19 pandemic.

Rosario *"was proactive, saw the problems Americans would soon be facing and knew the rules and regulations to make sure they saw relief,"* according to her nomination. Her company helped coordinate policy development and government compliance regulations, resulting in assistance to many.

The experience left her humbled and grateful. *"Our advancement during the pandemic still astonishes me,"* she shares. *"We did not allow the pandemic to immobilize us. When doors were closing, we were opening them."*

The wife and mother says she hopes to be remembered for *"creating paths of opportunity for not only my family but for other families as well,"* whether through her business, her personal or professional charitable efforts, or her example. *"I've had the chance to create pathways for others to thrive. Every time, it brings my heart joy."*

2022 Women Who Mean Business:

Stephanie Rosario works to provide affordable housing solutions nationwide.

Host of the PHA Podcast
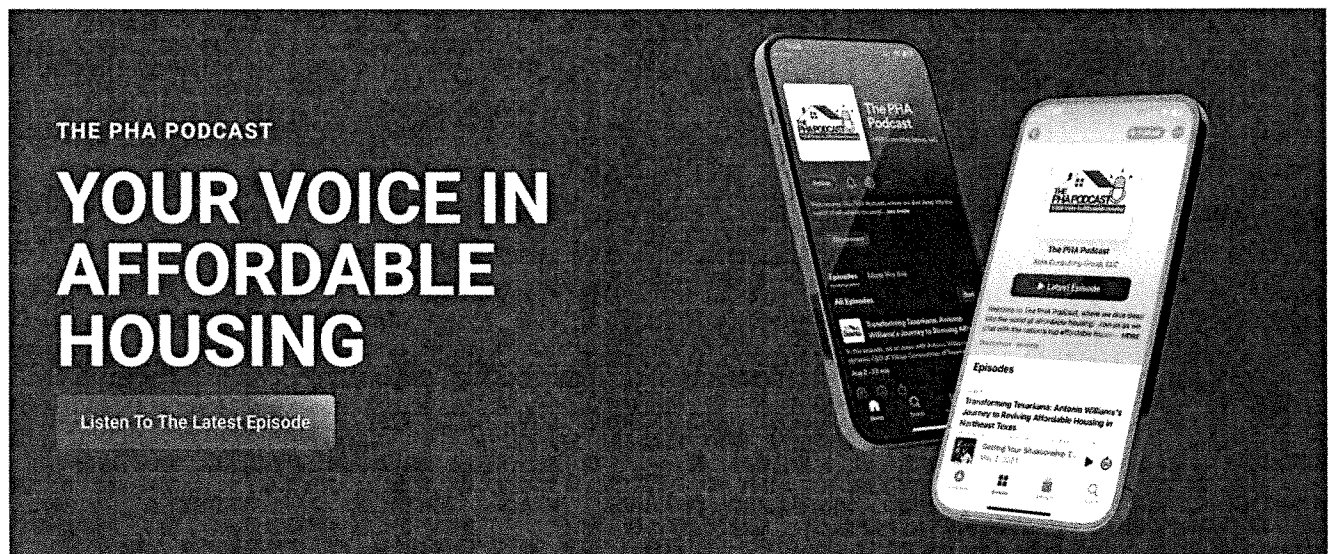
Exhibit A

CONSULTING SERVICES AGREEMENT

This **CONSULTING SERVICES AGREEMENT** ("Agreement") is made effective as of [Effective Date] ("Effective Date") by and between AMA Consulting Group, LLC ("Consultant") and [Client Full Legal Name] ("Client"). As used herein, Consultant and Client may be referred to singly as a "Party" and collectively as the "Parties."

RECITALS:

WHEREAS, Client desires to engage Consultant to provide consultancy services as a contractor upon the terms and conditions set forth in this Agreement; and

WHEREAS, Consultant desires to be engaged by Client upon the terms and conditions set forth in this Agreement.

NOW, THEREFORE, in consideration of the premises and mutual covenants herein contained, the Parties do hereby agree as follows:

1.   Engagement. Subject to the terms and conditions set forth in this Agreement, Client hereby engages the Consultant to perform the Scope of Work, and the Consultant hereby accepts such engagement.

2.   Scope of Work. Consultant shall perform the scope of work set forth on Exhibit A (the "Scope of Work") as it relates to the project ("Project") described in the Scope of Work.

3.   Compensation and Payment Terms.

    a.   Compensation. In consideration of Consultant's performance of the Scope of Work, Client shall [pay to Consultant the lump sum amount of $XX,XXX.XX][compensate Consultant on a time and materials basis, in accordance with the labor rates set forth in the Scope of Work, in an amount not to exceed $XX,XXX.XX] (the "Compensation"). Client is required to pay ___% retainer ($x,xxx.xx) to begin work and this retainer will be applied towards the final invoice. To the extent that the Scope of Work is renewable and/or extendable for success years, upon each anniversary, the Compensation can increase by three percent (3%) as a cost of living increase. Notice of this increase will be provided to Client by Consultant at least thirty (30) days prior to the effective date of the renewal or extended term, and will be automatically adjusted on monthly invoices.

    b.   Manner of Payment. Throughout the Project, Consultant will progress invoice Client monthly. Each monthly progress invoice will represent an increment of the aggregate Compensation, as well as any agreed upon reimbursable expenses. Client shall pay each progress invoice no later than fifteen (15) days from the date of the invoice. Client shall make payment via electronic funds transfer, directed to a U.S. account or accounts designated in writing by Consultant or via check through personal delivery or U.S. mail. Client shall pay Consultant in USD (U.S. Dollars).

    c.   Payment Delinquency; Right to Stop Work. Past due invoices will be subject to a late fee at a rate equal to the greater of (a) five percent (5%), or (b) the maximum amount permitted under applicable law. Consultant shall have the right to cease performing the Scope of Work until any such delinquent invoices are paid in their entirety. Further, to the extent that invoices remain outstanding and delinquent, Consultant reserves the right to seek legal collection on any accounts deemed uncollectable, including collection fees.

d. <u>Changes to the Work</u>. Any changes or additions to the Scope of Work will result in an increase to the Compensation, as set forth in a duly executed change order ("<u>Change Order</u>") hereto. Unless the Change Order provides otherwise, additional work will be performed on an hourly time and materials basis, at an hourly rate of $175.00 (subject to the cost of living increase set forth in <u>Section 3(a)</u> hereof.

e. <u>Travel and Expenses</u>. Client will be responsible for any additional travel and accommodation costs incurred by Consultant for on-site visits not included in the proposal if done so at the client's request. Such costs – which include transportation, lodging, per diem, and other normally-incurred travel expenses – shall be incurred in accordance with Consultant's Travel and Expense Policy, which is available to Client upon request. Unless otherwise described in the Scope of Work, those costs shall be invoiced to Client upon completion of the on-site visit, and payment thereof shall be made within fifteen (15) days of issuance of the invoice.

4. <u>Term</u>. The term of this Agreement (the "<u>Term</u>") shall commence on the Effective Date and continue until the completion of the Scope of Work, unless earlier terminated in accordance with <u>Section 5</u> hereof. For clarity, the completion of the Scope of Work shall be determined by Consultant's delivery of all deliverables and performance of all services described on <u>Exhibit A</u>. Any extension of the Term beyond the completion of the Scope of Work shall require the mutual written agreement of the Parties, as set forth in a Change Order.

5. <u>Termination</u>. Either Party may terminate this Agreement for any reason or no reason without cause upon sixty (60) days prior written notice to the other Party. In the event of termination, (a) Client shall pay Consultant for all services performed and expenses incurred up to the effective date of termination; and (b) each party shall promptly return or destroy all Confidential Information of the other party in accordance with <u>Section 6</u>. The parties' rights and obligations under <u>Sections 6, 7</u> shall survive any termination of this Agreement.

6. <u>Confidentiality and Publicity</u>.

a. <u>Confidentiality</u>. As used herein, "<u>Confidential Information</u>" means any non-public information disclosed by either Party ("<u>Disclosing Party</u>") to the other party ("<u>Receiving Party</u>"), either directly or indirectly, in writing, orally or by inspection of tangible objects, including without limitation: business plans, financial information, technical data, trade secrets, customer lists, supplier information, product plans, designs, prototypes, methodologies, inventions, software, and other business or technical information. Confidential Information does not include information that: (a) was publicly known prior to the time of disclosure; (b) becomes publicly known after disclosure through no action or inaction of the Receiving Party; (c) is already in the possession of the Receiving Party at the time of disclosure; (d) is obtained by the Receiving Party from a third party without a breach of such third party's obligations of confidentiality; or (e) is independently developed by the Receiving Party without use of or reference to the Disclosing Party's Confidential Information. The Receiving Party agrees not to use any Confidential Information of the Disclosing Party for any purpose except to perform its obligations under this Agreement. The Receiving Party agrees not to disclose any Confidential Information of the Disclosing Party to third parties or to its employees, except to those employees who have a need to know such information to perform their obligations under this Agreement and who are bound by written confidentiality agreements. The Receiving Party agrees that it shall take reasonable measures to protect the secrecy of and avoid disclosure and unauthorized use of the Confidential Information of the Disclosing Party. Without limiting the foregoing, the Receiving Party shall take at least those measures that it takes to protect its own confidential information of a similar nature. If the Receiving Party is required by law or court order to disclose Confidential Information, the Receiving Party shall give the Disclosing Party prompt written notice of such requirement prior to such disclosure and assistance in obtaining an order protecting the information from

public disclosure. Upon termination of this Agreement, or upon Disclosing Party's request at any time, the Receiving Party shall promptly return to the Disclosing Party all copies, whether in written, electronic or other form or media, of the Disclosing Party's Confidential Information, or destroy all such copies and certify in writing to the Disclosing Party that such Confidential Information has been destroyed. The obligations of confidentiality under this section shall survive the termination or expiration of this Agreement.

b. Publicity. Neither Party shall issue a press release or other public statement regarding the relationship of the Parties or this Agreement without the prior written consent of the other Party. However, Client agrees that Consultant may list Client as one of its clients in Consultant's marketing materials.

7. Non-Solicitation of Employees and Contractors. During the Term of this Agreement and for a period of two (2) years after its expiration or termination for any reason, neither Party shall, directly or indirectly: (a) solicit, induce, recruit, or encourage any employee, contractor, or consultant of the other Party to leave their employment or engagement with that Party; (b) hire or retain any employee, contractor, or consultant of the other Party; or (c) assist any third party in soliciting, inducing, recruiting, encouraging, hiring, or retaining any employee, contractor, or consultant of the other Party. For purposes of this section "solicit" does not include general advertisements or other broadly disseminated publications of employment opportunities not specifically directed towards employees, contractors, or consultants of the other Party. Each Party acknowledges that a breach of this provision would cause irreparable harm to the other Party, the extent of which would be difficult to ascertain. Accordingly, each Party agrees that, in addition to any other remedies to which a Party may be legally entitled, the non-breaching Party shall have the right to seek immediate injunctive relief in the event of a breach of this provision by the other Party. If any provision of this section is found by a court of competent jurisdiction to be unenforceable, the Parties agree that such court shall have the power to reduce the duration or scope of such provision or otherwise amend it, without affecting the validity of the remaining provisions of this Agreement.

8. Independent Contractor. Consultant's association with Client is and shall remain at all times as an independent contractor, and not as an employee. Neither Consultant nor any of Consultant's employees or service providers shall be deemed employees or agents of Client.

9. Indemnification.

a. Consultant Indemnification. Consultant shall indemnify, defend, and hold harmless Client and its officers, directors, employees, agents, successors, and assigns from and against all losses, damages, liabilities, deficiencies, actions, judgments, interest, awards, penalties, fines, costs, or expenses of whatever kind (including reasonable attorneys' fees) arising out of or resulting from: (a) bodily injury, death of any person, or damage to real or tangible personal property resulting from Consultant's acts or omissions; or (b) Consultant's breach of any obligation under this Agreement.

b. Client Indemnification. Client shall indemnify, defend, and hold harmless Consultant and its officers, directors, employees, agents, successors, and assigns from and against all losses, damages, liabilities, deficiencies, actions, judgments, interest, awards, penalties, fines, costs, or expenses of whatever kind (including reasonable attorneys' fees) arising out of or resulting from: (a) bodily injury, death of any person, or damage to real or tangible personal property resulting from Client's acts or omissions; or (b) Client's breach of any obligation under this Agreement.

c. Indemnification Procedure; Settlement. The party seeking indemnification (the "Indemnified Party") shall promptly notify the other party (the "Indemnifying Party") in writing of any claim for indemnification, and provide cooperation and assistance to the Indemnifying Party, at the

Indemnifying Party's sole expense, in connection with the defense of the claim or action. The Indemnifying Party shall not enter into any settlement without the Indemnified Party's prior written consent, which shall not be unreasonably withheld, conditioned, or delayed.

10. LIMITATION OF LIABILITY. IN NO EVENT SHALL CONSULTANT BE LIABLE TO CLIENT OR TO ANY THIRD PARTY FOR ANY LOSS OF USE, REVENUE, OR PROFIT OR LOSS OF DATA OR DIMINUTION IN VALUE, OR FOR ANY CONSEQUENTIAL, INCIDENTAL, INDIRECT, EXEMPLARY, SPECIAL, OR PUNITIVE DAMAGES WHETHER ARISING OUT OF BREACH OF CONTRACT, TORT (INCLUDING NEGLIGENCE), OR OTHERWISE, REGARDLESS OF WHETHER SUCH DAMAGE WAS FORESEEABLE AND WHETHER OR NOT CONSULTANT HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. NOTWITHSTANDING ANYTHING TO THE CONTRARY IN THIS AGREEMENT, CONSULTANT'S AGGREGATE LIABILITY ARISING OUT OF OR RELATED TO THIS AGREEMENT, WHETHER ARISING OUT OF OR RELATED TO BREACH OF CONTRACT, TORT (INCLUDING NEGLIGENCE), OR OTHERWISE, SHALL NOT EXCEED THE TOTAL AMOUNT PAID TO CONSULTANT PURSUANT TO THIS AGREEMENT AS OF THE DATE OF THE EVENT GIVING RISE TO THE CLAIM. CLIENT ACKNOWLEDGES THAT THE AMOUNTS PAYABLE HEREUNDER ARE BASED IN PART ON THESE LIMITATIONS, AND FURTHER AGREES THAT THESE LIMITATIONS SHALL APPLY NOTWITHSTANDING ANY FAILURE OF ESSENTIAL PURPOSE OF ANY LIMITED REMEDY.

11. WAIVER OF JURY TRIAL. EACH PARTY ACKNOWLEDGES AND AGREES THAT ANY CONTROVERSY THAT MAY ARISE UNDER THIS AGREEMENT IS LIKELY TO INVOLVE COMPLICATED AND DIFFICULT ISSUES AND, THEREFORE, EACH SUCH PARTY IRREVOCABLY AND UNCONDITIONALLY WAIVES ANY RIGHT IT MAY HAVE TO A TRIAL BY JURY IN RESPECT OF ANY LEGAL ACTION ARISING OUT OF OR RELATING TO THIS AGREEMENT, THE TRANSACTIONS CONTEMPLATED HEREBY OR THE SERVICES PROVIDED HEREUNDER.

12. Attorney's Fees and Costs. If any action at law or in equity is undertaken to enforce or interpret the terms of this Agreement, including any future amendments to addenda thereto, the prevailing Party shall be entitled to recover its reasonable attorney's fees, costs and necessary disbursements from the other, non-prevailing Party, in addition to any other relief to which the prevailing Party may be entitled.

13. Governing Law; Venue. This Agreement shall be governed by and construed in accordance with the internal laws of the State of Florida without giving effect to any choice or conflict of law provision or rule that would cause the application of laws of any jurisdiction other than those of the State of Florida. The Parties agree that jurisdiction and venue of any action or proceeding arising out of or in way related to this Agreement shall exclusively be in the state courts of competent jurisdiction located in Orange County, Florida.

14. Amendment and Assignment. Neither Party may assign or delegate any of their rights or obligations under this Agreement without the other Party's prior written consent. This Agreement may only be amended by a duly executed writing signed by both Parties hereto (including without limitation, a Change Order).

15. Waiver. No delay or failure by either Party in exercising any rights under this Agreement, and no partial or single exercise of any right, shall constitute a waiver of that or any other right.

16. Force Majeure. Neither Party shall be responsible or liable for any damages, delay in performance or failure to perform if caused by any act or occurrence beyond its reasonable control such as embargoes, changes in government regulations or requirements (executive, legislative, judicial, military or

otherwise), acts of war or terrorism, pandemic, epidemic power failure, electrical surges or current fluctuations, lightning, earthquake, flood, the elements or other forces of nature, or delays or failures of transportation.

17.   Severability. If any one or more provisions of this Agreement shall be held invalid or unenforceable, the validity or enforceability of all of the other provisions of this Agreement shall not be affected thereby. In the event a court of competent jurisdiction determines that the scope, time period, or geographical limitations specifically set forth herein are too broad to be capable of enforcement, said court shall be authorized to enforce such provisions as to scope, time and geographical area to the greatest extent allowed by law.

18.   Notices. All notices, requests, or other communications hereunder shall be in writing and either transmitted via overnight courier, hand delivery or registered mail, postage prepaid and return receipt requested, to the Parties at the address listed below their respective signatures or such other addresses as may be specified in writing.

19.   Entire Agreement. This Agreement, including any exhibits, addenda, and schedules appended hereto, constitute the entire agreement between the Parties hereto with respect to its subject matter.

20.   Conflict. In the event of any conflict, inconsistency, or discrepancy between the terms and conditions of this Agreement and the Scope of Work, the terms and conditions of this Agreement shall govern and prevail.

21.   Counterparts. This Agreement may be executed in counterparts, each of which shall be deemed an original, but all of which together shall be deemed to be one and the same agreement. A signed copy of this Agreement delivered by facsimile, e-mail or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original signed copy of this Agreement.

22.   Insurance – Consultant agrees to carry Commercial General Liability Insurance in an amount of not less than $1,000,000 per occurrence and $2,000,000 in the general aggregate. The Client shall be listed as additional insured on the Consultant's General Liability Insurance.

23.   Automobile Liability Insurance: The Consultant, its subcontractors or anyone directly or indirectly employed by them, shall secure and maintain during the life of this Contract, Automobile Liability Insurance, including hired and non-owned automobile liability coverage, in an amount not less than $1,000,000 Combined Single Limit per occurrence. Such coverage must apply to all vehicles used in connection with work performed by the Consultant for the Client for any vehicles driven on the Client's premises.

24.   Workers Compensation Insurance: The Consultant, its subcontractors or anyone directly or indirectly employed by them agrees that it will comply with all applicable Workers Compensation laws of the Client's State of registration and provide coverage within statutory limits. The Consultant will provide proof of such insurance coverage to the Client. Coverage will remain in effect for the duration of the contract.

25.   Non-Discrimination in Employment: Consultant and Client agree not to discriminate against any employee or applicant for employment because of sex, race, religion, color, or national origin.

- Signature Page Follows -

IN WITNESS WHEREOF, the Parties, intending to be legally bound, have executed and entered into this Agreement as of the Effective Date.

CLIENT: **CONSULTANT**:

By: _____   By: _____

Name: _____   Name: _____

Title: _____   Title: _____

Notice Address: _____   Notice Address: 1971 Lee Road, #203
                                                                      Winter Park, FL 32789

_____

EXHIBIT A
SCOPE OF WORK

[attached hereto]

TRUST SURVEY

The WiLD Trust Index™

Organization: **Sanford Housing Authority**

December 2024 | 17 Participants (81%)

Leadership = Trust™

Now you can measure it.
Now you can build it.

WiLD LEADERS®

The WiLD Trust Index ™

METHODOLOGY

The following methods were used to calculate results:

NTS: Net Trust Score
(net satisfaction)

NTS = **Strongly Agree%** - **Strongly Disagree%** - **Disagree%** + **100**

Scale Range: 0 - 200

140: Reinforce, 100: Improve, <100 Transform

For Quantitative/Scale Results:

Strongly
Disagree

Disagree

Neutral

Agree

Strongly
Agree

WiLD LEADERS ™

The WiLD Trust Index ™

Overall Net Trust Score

- ☐ High:
- ☐ Med:
- ☐ Low:

23%

22%

55%
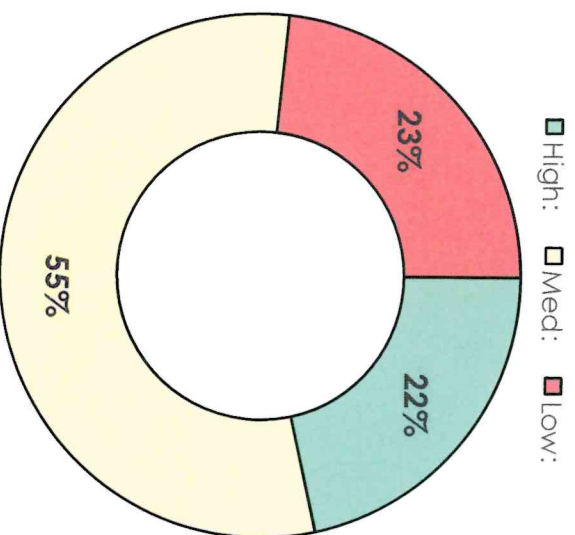
Trust Definition

Trust is your belief in my **integrity**, my **ability**, my **reliability**, my **strength**, and that I will tell you the **truth** when any of those things are lacking. Also, my same belief in you.

Integrity: That I _**will do**_ what you need and want me to do.
Ability: That I _**can**_ do it.
Reliability: That I will do it _**consistently**_.
Strength: That I will do it _**well**_.
Truth: That I will be _**honest**_ with you when any of those things are lacking.

Measured at the **Personal, Team,** and **Organizational** levels

⬤ WiLD LEADERS

The WiLD Trust Index™
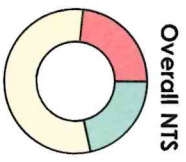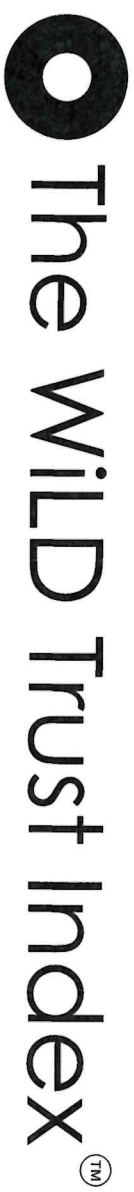
Top 3 Themes That Emerged:

1. Leadership and Organizational Dysfunction
2. Training, Resources, and Role Preparedness
3. Burnout and Negative Work Culture

Survey Questions:

What is the important strategic challenge you are facing right now, and what does trust have to do with it?

As you were answering the previous 11 questions what is the story behind your responses?

Overall NTS

WiLD LEADERS

◐ The WiLD Trust Index™
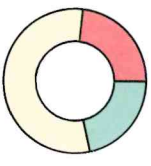
1. Leadership and Organizational Dysfunction

A significant theme revolves around leadership **challenges**, organizational **instability**, and a lack of **accountability**. Many employees describe inconsistent decision-making, favoritism, and an overall inability of leadership to provide clear direction or foster trust within the organization. These leadership shortcomings contribute to a **chaotic** and **demoralizing** work environment.

Example comments:

- *"The story is that since joining this team, many in both leadership and management tend to pass the buck."*
- *"The Blind leading the Blind is how I would categorize my answers above, and that no one wants to take accountability."*
- *"Building the agency back up to a standard performer... all staff must trust that its leadership has everyone's best interest at heart. The strong outspoken personalities dominate the less aggressive ones and create a culture of uncertainty and hostility."*

Overall NTS

◐ WiLD LEADERS™

The WiLD Trust Index ™

Overall NTS
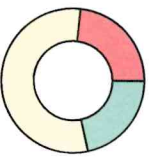
2. Training, Resources, and Role Preparedness

Another frequently cited theme is a **lack** of adequate training, resources, and direction. Employees feel they are **set up to fail** without the tools or knowledge required to perform their roles effectively. This issue contributes to **burnout, frustration,** and a sense that the organization is **unable** to address longstanding systemic challenges.

Example comments:

- "A major strategic challenge I am facing right now is learning all of the duties of my [role]. I have to trust that the one training me is giving me the proper knowledge to perform my tasks well."

- "I was hired to [do X]. Assistance is given but not where it would give great direction... I believe more training, workshops, and weekly meetings will increase understanding of each employee's weaknesses and strengths."

- "We do not have the tools or materials to [accomplish task]. One side of the company has everything when the other side has nothing. Bouncing around from unit to unit makes no sense."

3. Burnout and Negative Work Culture

Overall NTS

The comments also highlight **widespread** burnout, low morale, and a **toxic** work culture that prevents progress. Employees feel **unsupported, undervalued,** and **frustrated** with an environment characterized by negativity, lack of teamwork, and systemic disorganization.

Example comments:

- "The morale and teamwork has been so low for so long that it is hard to come out of our set ways and viewpoints of each other. At times I feel like I cannot advance by the lack of support."

- "The organization has a bad reputation internally and externally with all stakeholders."

- "There is a deep level of burnout and insecurity across [named] departments, due to the condition of these programs and the constant battle of trying to fix the past while planning for the future."

The WiLD Trust Index ™
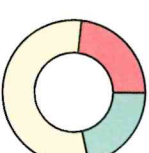
Personal NTS

☐ High: ☐ Med: ☐ Low:

137.4

- 6%
- 44%
- 50%
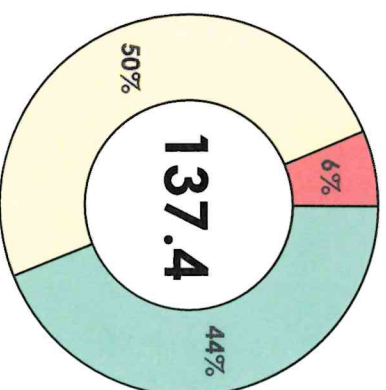
Team NTS

☐ High: ☐ Med: ☐ Low:

86.6

- 30%
- 17%
- 53%
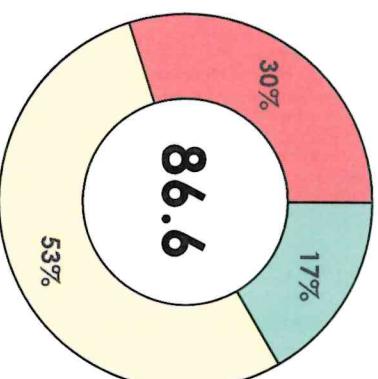
Organizational NTS

☐ High: ☐ Med: ☐ Low:

70.6

- 34%
- 4%
- 62%

Overall NTS

WiLD LEADERS

PERSONAL TRUST

Personal Net Trust Scores

Chart axis values: 40, 60, 80, 100, 120, 140, 160, 180

Category	Score
Personal Trustworthiness	141
Readiness	159
Awareness	124
Support	94
Investment	159
Self-Differentiation	171
Drive	118
Competence	159
Learning	129
Meaning & Productivity	147
Purpose	112

137.4

Survey Questions:

PERSONAL TRUSTWORTHINESS: People trust me.

READINESS: I am ready for what's next.

AWARENESS: I know myself and I know how others see me.

SUPPORT: I am surrounded by others who are honest and supportive.

INVESTMENT: I am intentional about my investments in others.

SELF-DIFFERENTIATION: I am clear and caring with others.

DRIVE: I am motivated at this moment of my life and work.

COMPETENCE: I know and trust my skills and competence to do my job.

LEARNING: I am learning and growing from my experiences in ways that are helpful to me and to others.

MEANING & PRODUCTIVITY: My work and life are meaningful and productive.

PURPOSE: I have a clear sense of purpose that guides my daily activities.

WiLD LEADERS

PERSONAL TRUST

	High	Med	Low	NTS
Personal Trustworthiness	41.2%	58.8%		141.2
Readiness	58.8%	41.2%		158.8
Awareness	29.4%	64.7%	5.9%	123.5
Support	17.6%	58.8%	23.5%	94.1
Investment	58.8%	41.2%		158.8
Self-Differentiation	70.6%	29.4%		170.6
Drive	29.4%	58.8%	11.8%	117.6
Competence	58.8%	41.2%		158.8
Learning	41.2%	47.1%	11.8%	129.4
Meaning & Productivity	47.1%	52.9%		147.1
Purpose	29.4%	52.9%	17.6%	111.8

Legend: High, Med, Low

137.4

Survey Questions:

PERSONAL TRUSTWORTHINESS: People trust me.

READINESS: I am ready for what's next.

AWARENESS: I know myself and I know how others see me.

SUPPORT: I am surrounded by others who are honest and supportive.

INVESTMENT: I am intentional about my investments in others.

SELF-DIFFERENTIATION: I am clear and caring with others.

DRIVE: I am motivated at this moment of my life and work.

COMPETENCE: I know and trust my skills and competence to do my job.

LEARNING: I am learning and growing from my experiences in ways that are helpful to me and to others.

MEANING & PRODUCTIVITY: My work and life are meaningful and productive.

PURPOSE: I have a clear sense of purpose that guides my daily activities.

WiLD LEADERS

TEAM TRUST

Team Net Trust Scores

Category	Score
Team Trust	82
Job Clarity	94
Development Plan	59
Composure	82
Knowing and Trust	94
Truth	88
Strength	100
Reliability	82
Ability	100
Integrity	71
Managerial Trust	100

Axis: 40, 60, 80, 100, 120, 140, 160, 180

Survey Questions:

TEAM TRUST: I trust my team.

JOB CLARITY: Every person on my team has a clear and effective job description.

DEVELOPMENT PLAN: Every person on my team has a development plan that will increase their performance and their well-being.

COMPOSURE: The people on my team are effective at handling conflict.

KNOWING AND TRUST: My team members know each other, and they know me.

TRUTH: My team members are honest and open with each other about their limitations and weaknesses.

STRENGTH: My team members are effective at doing the job they are assigned to do.

RELIABILITY: My team members are timely and consistent at getting things done.

ABILITY: My team members have the skills and knowledge to be effective in their jobs.

INTEGRITY: My team members do the things I need to have done so that I can be effective in my job.

MANAGERIAL TRUST: I trust the person I report to.

86.6

WILD LEADERS

TEAM TRUST

	High	Med	Low	NTS
Team Trust	11.8%	58.8%	29.4%	82.4
Job Clarity	23.5%	47.1%	29.4%	94.1
Development Plan	11.8%	35.3%	52.9%	58.8
Composure	11.8%	58.8%	29.4%	82.4
Knowing and Trust	17.6%	58.8%	23.5%	94.1
Truth	17.6%	52.9%	29.4%	88.2
Strength	17.6%	64.7%	17.6%	100.0
Reliability	11.8%	58.8%	29.4%	82.4
Ability	23.5%	52.9%	23.5%	100.0
Integrity	11.8%	47.1%	41.2%	70.6
Managerial Trust	23.5%	52.9%	23.5%	100.0

Legend: ■ High ■ Med ■ Low

86.6

Survey Questions:

TEAM TRUST: I trust my team.

JOB CLARITY: Every person on my team has a clear and effective job description.

DEVELOPMENT PLAN: Every person on my team has a development plan that will increase their performance and their well-being.

COMPOSURE: The people on my team are effective at handling conflict.

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INTEGRITY: My team members do the things I need to have done so that I can be effective in my job.

MANAGERIAL TRUST: I trust the person I report to.

WILD LEADERS

ORGANIZATIONAL TRUST

Organizational Net Trust Scores

Dimension	Score
Organizational Trust	53
Engagement	71
Aligned Retention	76
Recruiting	65
Belonging	94
Clarity and Accountability	59
Alignment	71
Leadership Trust	71
Vulnerability	65
Emotional Maturity	76
Learning and Investment	76

(x-axis: 40, 60, 80, 100, 120, 140, 160, 180)

70.6

Survey Questions:

ORGANIZATIONAL TRUST: The people we serve trust our organization.

ENGAGEMENT: The people in our organization are engaged.

ALIGNED RETENTION: The right people stay in our organization.

RECRUITING: Our organizational culture attracts great people.

BELONGING: The people in my organization belong here.

CLARITY AND ACCOUNTABILITY: The people in my organization are clear about the measures of their progress and they are accountable for their results.

ALIGNMENT: The people in my organization are aligned with where our organization is going.

LEADERSHIP TRUST: I trust the leaders of my organization.

VULNERABILITY: The leaders in my organization practice an appropriate level of vulnerability.

EMOTIONAL MATURITY: The leaders in my organization are both honest and caring.

LEARNING AND INVESTMENT: The leaders in my organization are invested in the learning and growth of the people they lead.

WILD LEADERS

ORGANIZATIONAL TRUST

	High	Med	Low	NTS
Organizational Trust	5.9%	41.2%	52.9%	52.9
Engagement	5.9%	58.8%	35.3%	70.6
Aligned Retention	5.9%	64.7%	29.4%	76.5
Recruiting	5.9%	52.9%	41.2%	64.7
Belonging	5.9%	82.4%	11.8%	94.1
Clarity and Accountability	5.9%	47.1%	47.1%	58.8
Alignment	5.9%	58.8%	35.3%	70.6
Leadership Trust		70.6%	29.4%	70.6
Vulnerability		64.7%	35.3%	64.7
Emotional Maturity		76.5%	23.5%	76.5
Learning and Investment	5.9%	64.7%	29.4%	76.5

Legend: ■ High ■ Med ■ Low

70.6

Survey Questions:

ORGANIZATIONAL TRUST: The people we serve trust our organization.

ENGAGEMENT: The people in our organization are engaged.

ALIGNED RETENTION: The right people stay in our organization.

RECRUITING: Our organizational culture attracts great people.

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LEARNING AND INVESTMENT: The leaders in my organization are invested in the learning and growth of the people they lead.

WILD LEADERS

The WiLD Trust Index ™

Overall NTS

QUESTION

- Scale of 1-10, how much do these results resonate as true to you?

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Summary

Largest Opportunities:

NTS

53 - Organizational Trust (O)
59 - Development Plan (T)
59 - Clarity and Accountability (O)
65 - Vulnerability (O)
65 - Recruiting (O)

Biggest Strengths:

171 - Self-Differentiation (P)
159 - Readiness (P)
159 - Investment (P)
159 - Competence (P)
147 - Meaning & Productivity (P)

P=Personal, T=Team, O=Organizational

WiLD TRUST Quadrant

Organizational Trust

Shell of Trust

Jungle of Trust

Sanford Housing
Authority

Stronghold of Trust

Islands of Trust

Team Trust
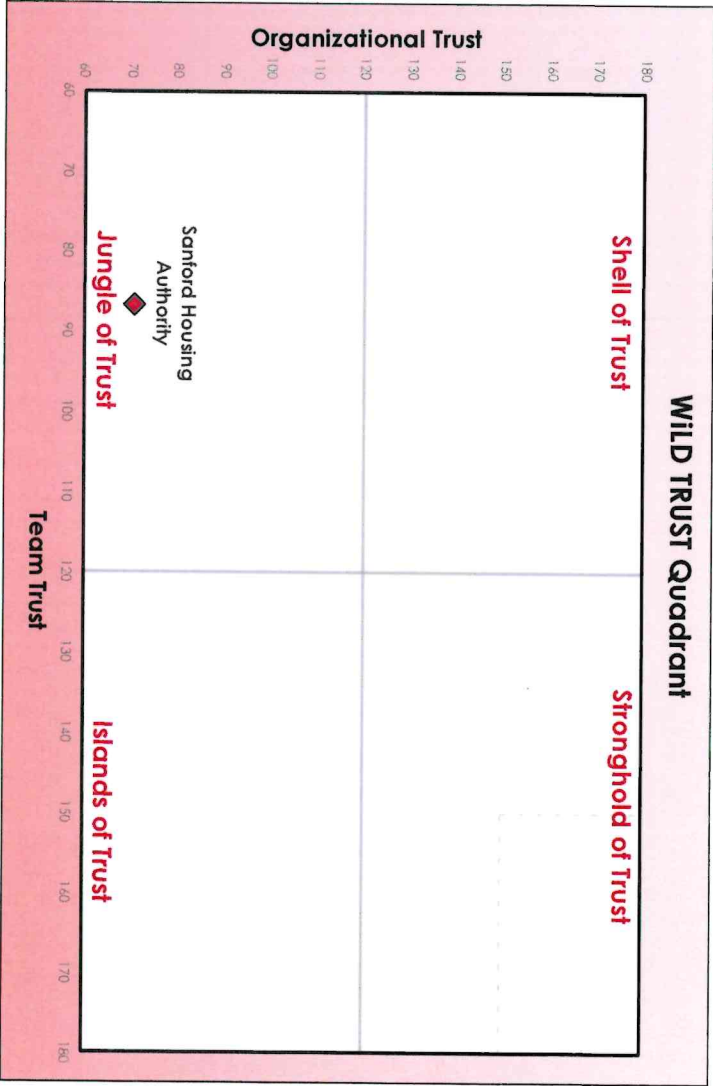
Team: **86.6** - Organization: **70.6**

● WiLD LEADERS™

Quadrant Descriptions

ORGANIZATIONAL
Trust →

TEAM
Trust ↓

Shell
Low Team + High Org
Strong corporate level structures, but weaker or fragile within. Outward strength but inward vulnerability. Like an egg, easily cracked and messy when breached.

Jungle
Low Team + Low Org
Like jungles, these organizations are often defined by chaos over truth and strategic clarity. Few walls, boundaries, or effective communication patterns exist.

Stronghold
High team + High Org
Strong trust corporately and between team members. Safe, highly defensible and easier to maintain, protect and build within.

Islands
High Team + Low Org
High levels of trust between team members but lacking a sense of trust at the corporate and cultural levels. Strong within, but weaker on the outside.

WiLD LEADERS

The WiLD Trust Index ™

ASK

- Who else in your industry could you introduce us to that you'd like to be included in the benchmark study?

DEPARTMENT REPORTS

PUBLIC HOUSING & 226 LINDEN VACANCY & MAINTENANCE REPORTS

Tenant Balances:	LUF	Harris Court	Public Housing Totals
Dec Rent & Other Charges	40,338.00	4,634.00	44,972.00
Dec Collections	31,074.86	3,354.31	34,429.17
Dec 2024 Ending Balance	9,263.14	1,279.69	-
Repayment Agreement Totals	3,042.30	-	3,042.30
Occupancy rate	94.00%	83.00%	89.00%
Rentable Vacant Units			-
Vacancy Loss	3,408	1,257	4,665
Vacancies:	9.00	6.00	
Average Rents	378.72	209.44	294.08
Occupancy rate	94.00%	83.00%	89.00%
Evictions	-	2	-
Move Ins	2	1	3
Move Outs	0	0	0
Recertifications Completed	3	0	
Waitlist			
0-1 Bedrooms	247	238.00	
2 Bedrooms	173	161	
3 Bedrooms	91	66	
4 Bedrooms	29		

Tenant Balances:	226 Linden	Public Housing Totals
Dec Rent & Other Charges	4,467.00	4,467.00
Dec Collections	4,075.00	4,075.00
		-
Dec 2024 Ending Balance	392.00	392.00
Repayment Agreement Totals	-	
Average Rents		
Vacancies:	227.40	
Vacancy Loss	-	-
Rentable Vacant Units	-	-
Occupancy rate	100.00%	
Move Outs	0	0
Move Ins	0	0
Evictions	-	-
Recertifications Completed	2	
2 Bedrooms	130	
0-1 Bedrooms	173	
Waitlist		

SANFORD HOUSING AUTHORITY MAINTENANCE DEPARTMENT REPORT

December 2024 MONTH END REPORT

WORK ORDERS	Linden Ave.	Utley Plaza	Foushee Heights	Harris Court	226 Linden
TOTAL WORK ORDERS ISSUED	28	62	13	14	0
TOTAL WORK ORDERS COMPLETED	27	42	12	13	0
OUTSTANDING WORK ORDERS	1	20	1	1	0
AVERAGE COMPLETION DAYS	5	16	9	10	0
EMERGENCY WORK ORDERS ISSUED	2	4	5	2	0
EMERGENCY WORK ORDERS COMPLETED With In 24 HOURS	2	4	5	2	0
OUTSTANDING EMERGENCY WORK ORDERS	0	0	0	0	0
% OF EMERGENCY WORK ORDERS COMPLETED With In 24 HOURS	100%	100%	100%	100%	100%
Amount Charged to Tenants	$40.00	$0.00	$77.00	$0.00	$0.00

RAD PBV/LIHTC AND MAINTENACE REPORTS

Tenant Balances:	Garden Gilmore	Matthews Ct.	CCSD Housing Totals
Dec 2024 Rent & Other Charges	96,087.00	33,814.00	**129,901.00**
Dec Collections	-90,910.00	-33,143.34	**(124,053.34)**
			-
Dec 2024 Ending Balance	5,177.00	670.66	**5,847.66**
Repayment Agreement Totals	3,750.46	510.00	**4,260.46**
Average Rents	215.03	330.11	**545.14**
Vacancies	31	3	
Vacancy Loss	30956	2,076	**33,032**
Rentable Vacant Units	2	-	**2**
Occupancy rate	74%	94.00%	**84.00%**
Move Outs	3	0	3
Move Ins	2	3	5

Recertifications Completed

Waitlist

0-1 Bedrooms	268	73	
2 Bedrooms	206	12	
3 Bedrooms	77		
4 Bedrooms	18		
5 Bedrooms	7		

MGG SANFORD HOUSING AUTHORITY MAINTENANCE DEPARTMENT REPORT

DECEMBER 2024 MONTH END REPORT

	Matthews Ct.	Garden-Gillmore
TOTAL WORK ORDERS ISSUED	16	42
TOTAL WORK ORDERS COMPLETED	12	41
OUTSTANDING WORK ORDERS	4	3
AVERAGE COMPLETION DAYS	0.3	1.56
EMERGENCY WORK ORDERS ISSUED	4	19
EMERGENCY WOs COMPLETED WITHIN 24 HRS	4	19
OUTSTANDING EMERGENCY WORK ORDERS	0	0
% OF EMERGENCY COMPLETED WITHIN 24 HRS	100%	100%
Amount Charged to Tenants	10	110

HOUSING CHOICE VOUCHER (HCV) REPORTS

Housing Choice Voucher Program

Occupancy/Intake Status Report
12/30/2024

This summary reflects the actual number of Units Leased and Paid at the end of the month

December 2024	Allocation	Actual Housed Units Leased	Lease Up Rate %
HCV (Regular Vouchers)	708	568	80%
VASH	25	16	64%
Harnett Training School (PBV)	37	37	100%
226 Linden Apartments (PBV)	5	5	100%
Matthews Court (RAD)	50	47	94%
Garden Street / Gilmore Terrace (RAD)	126	97	77%
Total HCV *At least 95%	951	770	81%

Admin Fee Received	Funds Received	Funds Utilized	Utilization Rate *At least 95% per TYT
$46,441.00	$460,381.00	$483,60.00	105%

New Vouchers Issued: 2   Homeownership :   3
Total Vouchers Searching: 81   HQS Inspection Performed: 61
New Admissions: 7   HQS Quality Control: 0
End of Participation: 2

SEMAP Indicators as of November 30, 2024

SEMAP Indicator		Current	HUD FYE Requirement
MTCS Reporting Rate		100%	95% or more
Indicator 9 Timely Reexaminations		100%	96% or more
Indicator 10 Correct Rent Calculations		100%	98% or more
Indicator 11 Pre-Contract HQS Inspections		100%	98% or more
Indicator 12 Annual HQS Inspections		100%	96% or more
Indicator 14 Family Self Sufficiency			
FSS Enrollment	43 (4 Mandatory)	1075%	80% or more
FSS Escrow Account	28	65%	30% or more

HCV Department YTD Rates

FY 2024	Allocation	HCV	VASH	HTS	226	MC	GG	Total	Lease Up Rate	Funds Utilization Rate
10/01/2024	951	566	17	37	5	50	95	770	88%	113%
11/01/2024	951	572	16	36	5	47	92	768	80%	116%
12/1/2024	941	568	16	37	5	47	97	770	81%	105%
01/01/2025										
02/01/2025										
03/01/2025										
04/01/2025										
05/01/2025										
06/01/2025										
07/01/2025										
08/01/2025										
09/01/2025										

Matthews Court, Garden Street and Gilmore Terrace Waiting List

Matthews Court	1BR	2BR
On Waiting List	72	13
Selected	15	0
Referred to MGG	2	0

Garden Gilmore	1BR	2BR	3BR	4BR	5BR
On Waiting List	254	195	74	16	6
Selected	32	42	42	10	6
Referred to MGG	3	0	2	0	0

226 Linden Waitlist (Closing 1/20/25)

226 Linden	1BR	2BR
On Waiting List	173	130
Selected	0	0
Referred to MGG	0	0

HCV Wait List (Closed)

HCV	Total
On Wait List	1373
Selected	10
Issued Voucher	0

RESIDENT SERVICES REPORT

RESIDENT SERVICES

SHA has recently been awarded 145,000 for the Family Self- Sufficiency (FSS) program.

DECEMBER 2024

Ms. Tamesia Wright joined the Resident Service Team December 8, 2024.

- The Resident Service team participated in the ConnectHomeUSA Summit on December 10th and 11th.
- Resident Services hosted a Christmas giveaway at Garden St community center on December 23rd, 2024. Families received a dinner box, and children were giving one gift and holiday snacks.
- The Resident Services team has started monthly Resident Services Meetings with first on January 16th at 2pm at Linden Heights.
- FSS has planned scheduled workshops until March – See attached calendar of events.
- Planning stages for case management w/"SocialBridge Technologies".
- FSS participant (L Blue) was motivated to extend her FSS contract to obtain Homeownership and meet family household income needs for a family of 3.
- Stewart Manor Relocation- Resident Service team have located over 85 files of tenants who have moved to other locations such as Matthew Courts, Garden St, Gilmore Terrace or Harris Court. The team is in the process of scheduling interviews and providing case management services w/Stewart Manor residents to see what needs are being met and what they need to move forward productively such as mental health, clothing, food, childcare, cable service, TANF, etc.
- There are currently 113 residents enrolled in the FSS program between Public Housing and the Housing Choice Voucher Program.
- The average FSS escrow is $2702.

- The Resident Service team is currently revisioning the FSS Action Plan and Homeownership Plan.
- The Team is also building a new Program Coordinating Committee which oversees the planning, implementation, and evaluation of the FSS program.

January 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 Office Closed	2	3	4 World Braille Day
5	6	7	8	9 Employee Rights Clinic 2:30pm NCWorks	10	11
12	13	14 LCL Family Movie Night 6pm	15 Resident Services Informational 11am & 2pm Via Teams	16 Linden Heights Resident Council 2pm	17	18
19	20 Office Closed MLK Day	21 Foushee Heights Resident Council 2pm	22 Linden Heights Kids Jam 6p-7p	23 Utley Plaza Resident Council 1pm	24 MLK Day Of Service Event 11am – 1pm	25
26	27	28 Gilmore Terance Kids Jam 6p-7p	29	30	31	

EVENTS

LCL Story Time Online
Visit YouTube @LeeCountyLibrariesNC
every Monday at 1 PM for a new story
time with Ms. Corrie!

LCL Family Movie Night
6pm – 8pm Sanford Branch

MLK Day of Service
Please join us at 1021 Clark Circle
Sanford NC. 27330 for a day of
service and rest. Come receive a
warm meal and fellowship.

Contact Resident Services for event details

salston@sha-nc.org 919-776-7655 ext. 4240
twright@sha-nc.org 919-776-7655 ext. 4226

February 2025

EVENTS

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3 LCL Story Time Online 1pm	4 Resume Tips 11:30am NCworks	5	6 Garden\Gilmore Movie Viewing 12pm	7	8
9	10 Garden Street Resident Council 3pm	11 Gilmore Terrace Resident Council 11am	12 BINGO 11am & 2pm Matthews Court	13 Matthews Court Movie Viewing 1pm	14	15
16	17 Budget counseling 10am-12pm	18 Resident Services Informational 11am & 2pm Via Teams	19 Matthews Court Resident Council 11am	20 Linden Heights Movie Night/Kids Jam 6p-7p	21	22
23	24	25	26 BINGO 12pm & 2pm Matthews Court	27 Black History Celebration 4p-6p	28	

Contact Resident Services for event details

salstonasha-nc.org 919-776-7655 ext. 4240

lwright@sha-nc.org 919-776-7655 ext. 4226

LCL Story Time Online
Visit YouTube @LeeCountyLibrariesNC
every Monday at 1 PM for a new story
time with Ms. Corrie!

PCC Meeting
Program Coordinating Committee
Meeting 6pm 19th

LCL Family Movies Night
6pm – 8pm Sanford Branch

March 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3 BINGO! Matthews Court 12pm	4	5	6 Community Connection 4pm – 6pm	7	8
9	10 Budget counseling 10am-12noon	11 Journaling to a healthy thinking 1pm	12	13 Credit Smart – Understanding your credit 1pm	14	15
16	17 Homebuyer workshop 4pm – 6pm	18 Foushee Heights Resident Council 1p	19 Utley Plaza Resident Council 1pm	20 Linden Heights Resident Council 1p	21	22
23	24	25 Journal to healthy living 11am	26 Vision Board 12pm & 2pm	27	28	29
30	31					

EVENTS

LCL Story Time Online
Visit YouTube @LeeCountyLibrariesNC every Monday at 1 PM for a new story time with Ms. Corrie!

BINGO
Come join us March 3rd at Matthews Court, 338 Temple Ave 1pm.

Contact Resident Services for event details
twright@sha-nc.org 919-776-7655 ext. 4226
salston@sha-nc.org 919-776-7655 ext. 4240

DEVELOPMENT REPORT

Sanford Housing Authority

January 2025 Development Report

I. **Redevelopment or Demolition and Development Plan for Stewart Manor Senior Development New Goals**

  A. Month 1-2:

  - **Action**: Conduct a detailed Physical Needs Assessment (PNA) for Stewart Manor Senior Development.
  - **Goal**: Identify the extent of repairs needed and evaluate the feasibility of redevelopment versus demolition and new development.

  B. Month 3-4:

  - **Action**: Based on the PNA results, decide whether to proceed with redevelopment or demolition and new development.
    - **Redevelopment**: Plan for comprehensive rehabilitation using a combination of bonds, tax credits, and other financing methods.
    - **Demolition and Development**: Develop a site plan for the new construction, ensuring it meets the needs of senior residents and complies with local regulations.
    - **Goal**: Secure funding and approvals for the chosen path.

  C. Month 5-6:
    - **Action**: If redevelopment is chosen, begin rehabilitation, focusing on critical repairs and upgrades.
    - If demolition and new development are chosen, start the demolition process and prepare the site for new construction.
    - **Goal**: Ensure the project is on track and aligned with the overall strategic plan for improving the property's physical condition

II. **Main Office First Floor Renovation**
  A. Appraisal
  B. Restoration
  C. Apply for Loan to restore and rehab first floor.
  D. Physical Needs Assessment

HUMAN RESOURCES REPORT

Sanford Housing Authority

January 2025 Human Resources Report

I. **New Hires**
- Lead FSS & Resident Services Coordinator: Tamesia Wright: Started December 2024
- Housing Specialist: Samantha Jackson: Started December 2024
- Executive Assistant to the CEO/ Communications Coordinator: Sarah Hudson: Started January 21, 2025: Relocating to the area.
- Housing Specialist: Tabitha Ferguson (Rehire): Starts February 3, 2025. Relocating to the area.

II. **Current Recruitment**
- HCV Manager
- Controller

III. **Training**

- HTVN Online Training
- REAC/ NSPIRE Training
- Industry Training
- Supervision & Management Training
- Creating a New Leadership Academy

IV. **Staff Retreat (New Organizational Culture)**
- True Colors Personality Test
- Trust Survey Discussion
- Energy Bus Review and Discussion
- Rebranding
- Values and Principles
- Teambuilding Activities
- Strategic Plan
- Improving Technology for Staff
- Employee Newsletter

V. **Operations**
- Creating New Onboarding Process
- Revising Personnel Policy
- Reviewing Job Descriptions
- Verifying Education and Certification
- Revising Performance Management System

January 23, 2025

To: SHA Employees

From: Anesha Pittman, HR Generalist

Subject: Announcing Our New Training Provider – HAI Group Online Training

Hello, All SHA Team Members,

I have great news! Our organization has just started a subscription to HAI Group Online Training. This robust training resource is specifically designed for public and affordable housing professionals, allowing you to take courses and earn certifications from your desktop. This new resource will help you expand your knowledge, learn new skills, and achieve your professional development goals. This new platform will also help us to better onboard new employees in areas such as customer service, effective communications, and specific topics that are relevant to our perspective roles at Sanford Housing Authority.

Your individual user account will be created in the next day or two. You will receive a separate email from the Support Team (lms@htvn.mskcloud.com) with a link to the website, your personal login ID, and password. You will have access to over 120 courses free of charge. Feel free to browse the online catalog and enroll in courses that interest you. You will also receive automated email notifications whenever a course is assigned to you by your manager.

For assistance, contact the Online Training Support Team at OnlineTraining@haigroup.com.

I wish you an enjoyable learning experience.

Best Regards,

Anesha Pittman
HR Generalist
(919) 897-2318

HAI GROUP TRAINING CATEGORIES

Catalog   Search Results

Search Results

7 results in Catalog   **Customer Service**

Filters	
⌄ Content Type	
☐ Curriculum (7)	
⌄ Course Provider	
☐ HAI Group Online Training (7)	
⌄ Content Tags	
☐ Tenant Relations (4)	
☐ New Employee Training (2)	
☐ Policyholder (2)	
☐ Property Management (2)	
☐ Human Resources Development (1)	
Show 3 more	
⌄ Credit Type	
☐ IACET CEU (CEUs) (1)	
⌄ Cost	
☐ Free	

☐ Show available content only

《 ⟨ Page 1 of 1 ⟩ 》

Customer Service in Housing — $99.00
Curriculum   In Customer Service, Human Resources, and 2 more (Show All)
Course Description: This course provides valuable ideas and strategies to enhance customer service delivery, benefiting individual st ...
English (United States)

Dispute Resolution - Informative Short — $49.99
Curriculum   In Wellness, Customer Service, and 1 more (Show All)
Course Description: This informative short highlights concrete skills for handling disputes between residents and/or employees. Durat ...
English (United States)

Let them Know You're Listening — Free
Curriculum   In Customer Service, Personal Development
Course Description: With so many distractions at work, it is sometimes challenging be an active listener for others. Listening is a s ...
English (United States)

Responding to Resident Complaints — $99.99
Curriculum   In Customer Service
Course Description: This course examines the types of complaints, how to evaluate them, the possible outcomes that arise from complai ...

Showing items in: **English (US)** (Change)

Fire Safety Game - Beat the Blaze — Free
Curriculum   In Risk Management
Course Description: Beat the Blaze is a fire safety learning game developed to help increase your awareness of fire safety. Answer as ...
English (United States)

Heat Illness Prevention - Informative Short — Free
Curriculum   In Risk Management
Course Description: This course is designed for any employee that may be exposed to conditions of excessive heat. The course reviews ...
English (United States)

Housekeeping and Hoarding Risks Course — Free
Curriculum   In Risk Management
Course Description: In this course, we will examine hoarding and its impact on the resident, housing units, and the housing organizat ...
English (United States)

How to Prevent Fraud — $149.99
Curriculum   In Compliance, Risk Management
Course Description: This course defines fraud, identifies internal controls and proven methods used to safeguard assets, and examines ...
English (United States)
Earn credits toward   IACET CEU (CEUs) (0.2)

FINANCIAL REPORT