Attachment 2

Scope of Services: Marketing Consultant

The below scope of work worksheet is based upon the ***Westchester County Affirmative Fair Housing Marketing Plan*** ("County AFHMP") and the ***Housing Development Affirmative Fair Housing Marketing Plan Requirements*** (the "Plan Requirements"). For complete listing of responsibilities, both documents are located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(i) and G-1(ii); and attached to this RFP as Exhibit 1 and Exhibit 2. All proposals must fully comply with the Plan Requirements and County AFHMP.

The scope of work worksheet includes, but is not limited to, the activities necessary to develop and implement affirmative fair housing marketing plans (the "Plan(s)") specific to individual housing developments.

Scope of Work

Work Item	Item Cost
A. Preparation of the Plan(s)	
1. Undertake steps to coordinate and centralize marketing for all affordable AFFH units and other units covered by the Plan Requirements.	
2. Develop a "template" for the Plans by development size for County approval. • 1 – 4 unit development • 5 – 29 unit development • 30 – 49 unit development • 50 or more unit development	 $_____ Plan $_____ Plan $_____ Plan $_____ Plan
3. The templates must be provided to the County in MS Word or in such form as may be requested by the County. 4. The templates must include, but not be limited to: • The process to define the local market area ("LMA") which shall encompass a population of between 5,000 to 50,000, depending upon population density; or comprise a 1-2 mile radius surrounding a housing development site; list the census tracts within the LMA, and identify the racial/ethnic characteristics of the LMA population using relevant 2010 U.S. Census data obtained from http://www.census.gov or http://www.westchestergov.com/planning/research/default.htm. • The form of notice to the County, and others, of intent to begin marketing to be used at appropriate point in time for each development.	

- Provide for affirmative marketing to the income groups as expressed in terms of the County's Area Median Income ("AMI"), at or below 80% AMI for homeownership developments and at or below 50% and 60% AMI for rental developments.
- Outline special efforts to reach and engage those in the marketing and outreach area, described in Part V of the Plan Requirements (See Exhibit 2 of this RFP), who are least likely to apply ("LLA") and ensuring outreach to racially and ethnically diverse households reaching all potentially eligible households.
- Templates for Advertisements ("Ads"), Press Releases and Public Service Announcements ("PSA") to be used for each type of development including homeownership and rental developments, or grouped developments if multiple developments or properties are available about the same time. All advertising for all units will be consistent with the Fair Housing Advertising Regulations at 24 CFR 109 and Fair Housing Act Regulations at 24 CFR 100.75. State expected number of each template to be produced.
- Contact list and model PSA to be run on each municipal cable station in the LMA and in the entire marketing and outreach area (9 County area including Westchester, Putnam, Rockland and Fairfax Counties, and all five boroughs in New York City) for each type of development undergoing marketing.
- Templates for Ads, Press Release or PSA for placement on web-based media sites, and state expected number of each template to be produced
- Templates of marketing brochures, fliers or other material and of application forms in both English and Spanish. All must be produced in electronic PDF format so that they may be posted on websites and provided electronically to the County and others. State expected number of each template to be produced
- Provision for development of marketing materials in Spanish language, and alternative resources to address other language needs, such as opening an account with a "Language Line" or alternative provider that provides 24/7 translators which can be accessed as needed by marketing staff to assist in serving all other limited English proficient ("LEP") persons.
- Provide that all print materials produced will include the Equal Housing Opportunity ("EHO") logo and, where applicable, the International Accessibility logo.
- A plan to coordinate advertising for developments and properties so as to reduce overall costs which also takes into consideration the media outlets and data analysis regarding the readership/audiences of media outlets within the marketing and

outreach area, and advertise in a manner that most effectively reaches the least likely to apply ("LLA") population. NOTE: Ad frequency and placement will be part of each development budget, and is not included as cost item in this scope of services.

- For developments of 1 – 4 units, the template must provide whether the there will be use of commercial media, and if there will be no use of any commercial media, the template plan should indicate the reasons for not using such media.
- Activities to seek opportunities for radio and television coverage (via interviews, press releases, and news coverage) including those serving LLA populations, as frequently as possible beginning on the date of initial marketing period; and that any press releases prepared should also be sent to all television and radio outlets.
- Provide steps to be undertaken by the marketing consultant to request community contacts and other outlets to distribute information through their social networks and use of Facebook and Twitter Pages; and also evaluation of use of social media to allow for updating over time, as new forms of social media emerge and gain mainstream membership.
- Steps to be undertaken to conduct outreach to all persons who have signed up on Westchester County's Centralized Intake System. The County will provide a contact list electronically upon request for those who have signed up for rental housing or those who have signed up for homeownership.
- A description of how the marketing consultant will:
    - Conduct or participate in at least two information workshops in locations with concentrations of LLA populations within the Marketing and Outreach Area which will be reasonably accessible to public transportation
    - Offer to provide in-person presentations to employees and union members of local businesses.
- The process to consult with municipal leadership and community contacts to conduct outreach to local civic organizations, neighborhood associations, faith-based organizations, and other groups to describe the housing, the value of diversity, and to encourage community members to welcome applicants and new residents of the housing, and encourage "open house" sessions welcoming the new residents.
- Ensure that all marketing materials to be provided to the applicants are also provided to the County for review prior to use with applicants; and that all marketing materials be provided to the County in electronic format.

• The steps and criteria for monitoring and evaluation of the outcome of marketing, including media, community contacts and other outreach efforts. • The steps and criteria for collection and retention of data relating to race and ethnicity, household composition, and source of referrals from applications, inquiries or attendance at informational meetings. • Steps to assure marketing for any subsequent sale or leases of housing units in accordance with the County requirements, including marketing of the property. • All other items identified in the Plan Requirements. For complete listing of responsibilities are located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(ii).	
B. Implementation of the Plan(s)	
1. Work with Developers to draft a Plan for each development; Developers will be required to work with the successful proposer: The marketing consultant will have the primary responsibility to produce the Plan; and it must specify the roles and responsibilities of the developer and others – such as marketing agent and/or property manager – involved in marketing the development, accepting and reviewing applications, and selection of eligible applicants Submit each development specific Plan to the County for review and approval: • 1 – 4 unit development • 5 – 29 unit development • 30 – 49 unit development • 50 or more unit development	$_____/Plan $_____/Plan $_____/Plan $_____/Plan
2. Implementation actions to be taken by the marketing consultant for each development must include, but not be limited to: • Timely submission of all required documents to the County • Issue a Press Release announcing that the housing units are available to the entire marketing and outreach area (using the template(s) provided). • Issue Press Releases and PSAs to appropriate outlets as identified in the Plan, including those serving the LLA population for each development or group of developments or properties.	

- Coordination of advertisements for all developments so as to reduce overall costs. NOTE: Ad frequency and placement will be part of each development budget, and is not included as cost item in this scope of services.
- Coordinate requests and placement of PSAs on each municipal cable station in the entire marketing and outreach area for developments of five (5) units or larger.
- Seek opportunities for media coverage, including Web-based media coverage including those that serve LLA populations, through interviews and available news coverage for the housing developments.
- Produce print and electronic brochures, fliers or other marketing material and application forms for each development in both English and Spanish. NOTE: Actual production of these marketing and application materials is specific to each development will be part of that development's budget, and is not included as cost item in this scope of services.
- Electronic Marketing brochures, fliers or other material and application forms in both English and Spanish must be produced in electronic PDF format so that they may be posted on websites and provided electronically to the County and others.
- Provision for alternative resources to address other language needs, such as opening an account with a "Language Line" or alternative provider that provides 24/7 translators which can be accessed as needed by marketing staff to assist in serving all other LEP persons.
- Request an electronic download of the contact information of all who have signed up on the County's Central Intake list two-weeks prior to initiation of the marketing period; and notify all on that list of the availability of the housing units and direct them to sources for additional information. NOTE: The specific outreach activities will be part of each development budget, and is not included as cost item in this scope of services.
- Document contact and follow-up with community contacts engaged in the outreach through such sources as call logs and email correspondence.
- Conduct or participate in at least two information workshops in locations with concentrations of LLA populations within the Marketing and Outreach Area, which are reasonably accessible to public transportation.
- Conduct outreach to local civic organizations, neighborhood associations, faith-based organizations and other groups in

consultation with municipal leaders and community contacts to encourage community members to welcome applicants and new residents of the housing; and to describe the housing and the value of diversity. • Encourage community groups to hold open house sessions for prospective residents. • Collect data on a monthly basis (including from the developer, the developer's marketing agent, or staff, as appropriate) that will be used to assess the effectiveness of the marketing efforts. The data analysis will be evaluated as described in the approved Plan for each development, and will be in accordance with HUD's Handbook 8025.1, Chapter 2. • Adjust or increase outreach activities and advertising as advised by the County based on the monthly report showing effectiveness of marketing efforts. • Provide for required training of marketing consultant's staff, as appropriate including, without limitation, as required by Federal, New York State and Local Fair Housing Laws, prior to the initiation of the marketing period for any housing development, and document that such training has been provided to all participants in the marketing of the development, including the Developer, Marketing Agents or other staff, including Property Management staff, as appropriate. • Any other items identified in the Plan Requirements. For complete listing of responsibilities are located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(ii).	
C. Monitoring of Plan(s)	
1. Prepare and submit reports, in such form as may be requested by the County including: • A monthly report to the County summarizing marketing activities for that month (include) documentation of compliance with County requirements and federal, state and local fair housing laws • Quarterly reports to the County summarizing the data from the monthly reports for that period • A report for each development upon completion of the initial marketing for the development	$_____/ Year $_____/ Quarter $_____/ Development

2. The reports must include, but are not limited to:
   - Number of inquiries and applications for each development
   - Disposition of the applications, including the number accepted for processing; the number rejected, with reason for rejections; or other disposition status and action including selection for occupancy.
   - Data on race and ethnicity, household composition and source of referral from applications or inquiries; referrals from community groups; and information provided by attendees at informational meetings for each development
   - Data on race and ethnicity, household composition of those households selected for the housing, and have occupied their unit.
   - Such information should be provided to the County electronically in an excel file, in a format and content as approved by the County.
   - Any other items, as identified in the Plan located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(ii).

3. The County will review and monitor the reports and marketing data collected pursuant to Part VIII of the Plan Requirements (see Exhibit 2 of this RFP) which may result in the County directing an increase in marketing efforts, or re- evaluate outreach efforts in accordance with Part V of the County AFHMP (See Exhibit 1 of this RFP).
4. It should be noted that any reporting required pursuant to Section C will include aggregation of reports as the County may request.

D. Services to Homeowners of 1-4 Owner-Occupied Units

1. Upon completion of the initial marketing and occupancy of any owner occupied properties, the marketing consultant will be authorized, and must undertake re-marketing and income eligibility of the subsequent residents, in accordance with the County's requirements of the below types of properties. Such work includes, but is not limited to:
   - Identification and selection of a new homebuyer of all owner-occupied units, where the initial or subsequent owner is selling or transferring their property;
   - Identification and selection of a new homebuyer of all owner-occupied 1 – 4 family properties; and
   - Identification and selection of new tenants in all owner-occupied 1 – 4 family properties, where the initial or subsequent owner has a vacancy and is offering rental units for lease.

2. The charge for providing this service to the property owners will not exceed the maximum identified by type of property, including any escalation fee beyond 2012:	
• Resale of a individual homeownership unit	$_____/Unit
• Resale of a 2 – 4 family home	$_____/ 2-4 Unit Property
• Identification of a tenants for one (1) rental unit in a owner occupied 2 – 4 family home	$_____/ Rental Unit
• Annual Escalation Fee after 2012 (percent increase/year)	_____% per Year

The below listed work scope items are all items that the County must conduct as part of the ***Westchester County Affirmative Fair Housing Marketing Plan*** ("County AFHMP"), but may be provided under an agreement with the marketing consultant, at the County's discretion.

E. Optional Work Items (County AFHMP)	Item Cost
1. Conduct ***Housing Alive*** bus tours of affordable housing developments (estimated 5 tours, 1 in each of 5 regions)	$_____/ Tour
2. Update ***Housing Alive*** video (view the video at: _____)	$_____/ Update Video
3. Draft PSA & Press Releases for County (estimated ___ PSA or Press Release)	$_____/ PSA or Press Release
4. Work with community informational resources including libraries, churches community agencies, municipalities and non-profit agencies, including those which deal with the disabled community, seniors and minority groups who are LLA to help disseminate information to the public	$_____/ Annually
5. If requested, ensure that all County marketing materials include Spanish language materials, and access a language line to serve other LEP populations	$_____/
6. Provide marketing material to faith based and community organizations the serve newly arrived immigrants	$_____/ Annually
7. Provide marketing material to adult-education training centers or ESL cases, as requested	$_____/ Annually
8. Encourage voluntary affirmative marketing agreements between local real estate industry trade associations and HUD-certified housing counseling agencies, including provisions for reduced fees and advice to potential customers about available AFFH units	$_____/ Annually

Housing Action Council

55 South Broadway
Tarrytown, NY 10591

Response to RFP for Marketing Consulting Services

Westchester County Department of Planning

148 Martine Avenue, Room 414

White Plains, NY 10601

August 24, 2012

Housing Action Council
55 South Broadway
Tarrytown, NY 10591
(914) 332-4144
(914) 332-4147

Rosemarie Noonan
Executive Director
rnoonan@affordablehomes.org

Alan R. Gordon
Deputy Director
agordon@affordablehomes.org

August 24, 2012

Westchester County Department of Planning
148 Martine Avenue, Room 414
White Plains, New York 10601

RE: Marketing Consulting Services

To Whom It May Concern:

Enclosed are an original and three copies of the proposal in response to your Request for Marketing Consulting Services. This proposal is submitted in collaboration with the New York Mortgage Coalition as the lead.

The proposal will demonstrate that we have experience with HUD housing programs, housing counseling and successful outreach and placement of applicants who may be considered least likely to apply. To the extent that we may be marketing units and qualifying applicants for those units, we will have in place sufficient personnel and procedures to avoid even the appearance of impropriety. We will separate the functions as appropriate and as we currently do.

We would be happy to meet with you and discuss our proposal.

This proposal constitutes a valid, binding and continuing offer at the prices set forth in the proposal for a period of sixty (60) days from the deadline for acceptance of proposals as set forth herein.

Sincerely,

Rose Noonan

Rosemarie Noonan

Proposal to Provide Marketing Consulting Services For the Westchester County Department of Planning

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PROPOSER CERTIFICATION

The undersigned agrees and understands that this proposal and all attachments, additional information, etc. submitted herewith constitute merely an offer to negotiate with the County of Westchester and is NOT A BID. Submission of this proposal, attachments, and additional information shall not obligate or entitle the proposing entity to enter into a service agreement with the County of Westchester for the required services. The undersigned agrees and understands that the County of Westchester is not obligated to respond to this proposal nor is it legally bound in any manner whatsoever by the submission of same. Further, the undersigned agrees and understands that any and all proposals and negotiations shall not be binding or valid against the County of Westchester, its directors, officers, employees or agents unless an agreement is signed by a duly authorized officer of the County of Westchester and approved by the Westchester County Board of Acquisition & Contract and by the Office of the County Attorney.

It is understood and agreed that the County of Westchester reserves the right to reject consideration of any and all proposals including, but not limited to, proposals which are conditional or incomplete. It is further understood and agreed that the County of Westchester reserves all rights specified in the Request for Proposals.

It is represented and warranted by those submitting this proposal that except as disclosed in the proposal, no officer or employee of the County of Westchester is directly or indirectly a party to or in any other manner interested in this proposal or any subsequent service agreement that may be entered into.

Rosemarie Noonan
Proposer Name

By: Rosemarie Noonan / Executive Director
Name and Title
Housing Action Council

SOLE CORPORATE OFFICER ACKNOWLEDGMENT

STATE OF NEW YORK)
ss.:
COUNTY OF)

On this 23rd day of August, 2012, before me, the undersigned, personally appeared Rosemarie Noonan, personally known to me or
(Name of Sole Officer)
proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is (are) subscribed to the within instrument and acknowledged to me that he/she executed the same in his/her capacity as President and sole officer and director of Housing Action Council, Inc., the corporation described in and which executed the
(Name of Corporation)
within instrument, and acknowledged that he/she owns all the issued and outstanding capital stock of said corporation, and that by he/she signed the within instrument on behalf of said corporation.

Theresa I. Fleischman

Notary Public

THERESA I. FLEISCHMAN
Notary Public, State of New York
No. 4944328
Qualified in Westchester County
My Commission Expires Nov. 21, 2014

Westchester County RFP
Affirmative Fair Housing Marketing Consulting Services

PROPOSER PROFILE

Proposer:

Housing Action Council
55 South Broadway
Tarrytown, New York 10591
914/332-4144
Incorporated: 1974
Employees: 11

REFERENCES

City of Yonkers:

Managed the City's Affordable Housing Program pursuant to a Housing Remedy Order which involves affirmative marketing and mobility counseling.

Hon. Philip Amicone (Mayor 2004-2011)
718 North Broadway, Yonkers, NY 10701 914/963-8646

Mr. Jeffrey Williams, Commissioner of Planning
87 Nepperhan Avenue – 3rd floor, Yonkers, NY 10701 914/377-6150

Marilyn Melkonian, Federal Court Monitor
Telesis Corp.
1103 30th St NW – 4th Floor
Washington, DC 20007
(202) 333-8447

Village of Port Chester:

Conducted outreach and marketed Fox Commons affordable condominiums; designing Village's Housing Rehabilitation Program

Hon. Dennis Pilla, Mayor
222 Grace Church Street, Port Chester, NY 10573 914/939-5200

Mr. Tony Cerreta, Esq., Town Counsel
222 Grace Church Street, Port Chester, NY 10573 914/939-5200

Kearney Real Estate Development Group:

Conducted outreach and marketed several affordable rental housing developments including Wynwood Oaks and The Mews at Baldwin Place

Mr. Ken Kearney, Principal
P.O. Box 925, Baldwin Place, NY 10505 845/742-9764

Wilder Balter Partners:	Conducted outreach and marketed (and developed AFHMP) for fair and affordable housing development in Larchmont and Cortlandt Mr. Bill Balter, Partner 570 Taxter Road, Elmsford, NY 10523 914/262-5279

Housing Action Council
55 South Broadway
Tarrytown, NY 10591
(914) 332-4144
(914) 332-4147

Rosemarie Noonan
Executive Director
rnoonan@affordablehomes.org

Alan R. Gordon
Deputy Director
agordon@affordablehomes.org

PROPOSAL TO PROVIDE MARKETING CONSULTING SERVICES

The County of Westchester (County) is seeking Marketing Consulting Services to effectively market Fair and Affordable Housing Developments to assure that those who might be considered least likely to know about and apply for such housing are aware of the opportunities, and take advantage of them. The County wants to ensure that Fair and Affordable Housing Developments are marketed in accordance with *U.S. ex rel. Anti-Discrimination Center of Metro New York v. Westchester County* (Settlement Agreement") and the "Housing Development Affirmative Fair Housing Marketing Plan Requirements" as approved by the Monitor. The services to be delivered are tiered as follows:

1. **Preparation of the Affirmative Fair Housing Marketing Plan** ("Plan") -- The overall goal is to coordinate and centralize the marketing for all fair and affordable housing units. This work includes developing comprehensive "templates" for Plans for different size developments . These templates must contain certain information and processes and must meet the requirements as outlined in the RFP.

2. **Implementation of the Affirmative Fair Housing Marketing Plan**
   a. Development of specific Affirmative Fair Housing Plans for each development which includes but is not limited to issuance of press releases and PSAs; coordination of advertising; seeking opportunities for media coverage; coordination of outreach to civic organizations; production of brochures, fliers, and other marketing materials; and data collection and evaluation
   b. Implementation of the Plans

3. **Monitoring of Plans** -- In order for the County to assess the effectiveness of the Plans, individual and aggregate reports are needed reflecting number of inquiries and applications; disposition of the applications and data on race and ethnicity, etc.

4. **Services to Homeowners of 1-4 Owner Occupied Properties** – This service is directed to the timely resale and subsequent lease ups of owner occupied one to four unit properties in a timely manner and at the same time maintains opportunities over the long term for LLA populations.

The Housing Action Council is prepared to perform all the mandatory Work Items identified in the Scope of Work as outlined in the RFP and several of the ones identified as "Optional". The Housing Action Council has assembled a qualified team to prepare the Plan as described in the Scope of Work "A. Preparation of the Plan(s)" and to implement those Plans "B. Implementation of the Plan(s) over a three year period. Our team which includes staff of the Housing Action Council, social media consultants,

and the New York Mortgage Coalition has the skills, experience, and relationships to assure that projects are fairly and affirmatively marketed and that those who are least likely to know are advised of the opportunities and engaged in taking advantage of them. In addition our services will coordinate and centralize marketing for all affordable AFFH units and other units covered by the Plan requirements.

SCOPE OF WORK TO BE PERFORMED

A. Preparation of the Plan

Upon selection as the Marketing Consultant, HAC will review the existing templates and Plans that have been developed to date to direct the marketing of Fair and Affordable Housing Developments. In addition, HAC will review the content and results of other affirmative marketing plans that have been designed and implemented outside of Westchester County. (HAC has gathered such plans and received assistance from the Cornerstone Partnership in identifying such plans.) HAC will review existing templates and plans in the context of:

- their effectiveness in reaching Least Likely to Apply (LLA) Populations and having LLA Populations take advantage of opportunities;
- the extent to which they achieve the goals of the Settlement Agreement and the Plan requirements;
- their compliance with HUD's "Implementing Affirmative Fair Housing Marketing Requirements" (HUD's Handbook 8025.1,REV-2); and
- culturally specific programming and linguistically appropriate services

HAC will also convene an advisory meeting of marketing specialists, public relations/social media professionals, community organizations, and organizations that specifically represent LLA populations and the disabled community to discuss the content and approaches within the Plan and to seek guidance on how the Plan could be enhanced. The New York Mortgage Coalition (NYMC) which is collaborating with HAC on this proposal will assist in organizing this meeting. Participating lenders in the NYMC will have representatives from their marketing departments, in particular, those with experience with emerging markets and new immigrants, at this meeting.

Based on these reviews and analyses, HAC will develop the four templates for the following types of developments:

- 1 – 4 unit developments
- 5-29 unit developments
- 30-49 unit developments
- 50 or more unit developments

HAC will periodically evaluate the templates based on the results of their use and convene advisory meetings to present the results and participate in the evaluations.

Timetable for Plan (assuming an October 1, 2012 start date)

Milestones

1. Review existing templates and plans (Oct. 1 – Oct. 12, 2012)
2. Convene meeting of specialists (week of October 15, 2012)
3. Submit drafts of templates to County (week of October 22, 2012)
4. County review of templates (week of October 29, 2012)
5. Completion of Plan templates (November 5, 2012)

B. Implementation of the Plan

The RFP outlines the time frame for the development and submission of Plans by tenure and size and the initial marketing periods for 2012, 2013 and 2014. The Housing Action Council recognizes the importance of timeliness in preparing and implementing Plans. This is a representation that Housing Action Council is prepared to prepare and implement plans in a timely manner as outlined in Attachment 1 in the RFP, i.e., prepare 13 Plans in 2012, 10 in 2013, and 8 in 2014 and implement 5 in 2013 and 12 in 2014. HAC also recognizes the development and time schedules change and are prepared to accommodate those changes that may occur.

Time Schedule

Below is a projected time schedule for implementation of each Plan and milestones for each Plan:

1. Meet with the development team, including in-house marketing and management as applicable, to review the requirements and template for the appropriate size development and to identify specific roles and responsibilities (within 10 days of notice of need for the Plan)
2. Prepare Plan and submit to Developer for review (within 7 days)
3. Incorporate changes as appropriate and submit to County for final approval (within 7 days)
4. Meet with the development team 60 to 90 days prior to actual implementation of the plan allowing for a 120 day marketing period.
5. Begin preparation of marketing materials 45 days prior to 120 day marketing period and ready the media and community groups for distribution
6. Managing marketing activities during the 120 day period, including data collection and adjustments in marketing plan if necessary.

C. Monitoring of Plans

The Housing Action Council has a data collection system in place for collecting the type of information set forth in C.2 of the Scope of Work which can be readily modified to collect additional information. HAC will handle data collection depending on HAC's role – as the agency which handles the inquiry of the potential applicant and receives the applications or as the agency which liaisons with developer's staff who handles inquiries and applications. If HAC is not handling inquiries and applications directly, HAC will work with developer's staff prior to initiating the marketing to develop a system to collect the necessary data for the reports, including providing HAC's data collection system to them. HAC will also arrange for the data to be accessible to HAC.

Time Schedule

Monthly reports will be submitted to the County by the 15th of the subsequent month.
Quarterly reports will be submitted to the County by the 15th of the subsequent month after the quarter.
Reports for specific developments will be provided within 20 days of closing of the marketing period, including the lottery.

D. Services to Homeowners of 1-4 Owner-Occupied Units

The Housing Action Council is prepared to provide the service as outlined in the RFP. HAC has extensive experience in this area as it currently handles a similar activity for approximately 250 scattered site homes in Yonkers and an additional several hundred units on behalf of municipalities. The key to effective management of these activities is to provide clear and periodic guidance to the homeowners and to manage the re-sale and lease-ups in a timely manner.

Special Components of Scopes of Services.

Social Media Programming – HAC with professional assistance and the involvement of the New York Mortgage Coalition will design and implement a social media campaign in connection with our marketing services. It will include Facebook, Twitter, LinkedIn and possibly You Tube. Our Social Media Campaign will include:

a) Developing a plan for affirmatively marketing fair and affordable housing opportunities through social media;
b) Engaging supporters, colleagues, and prospects in the campaign;
c) Creating compelling content;
d) Sharing information such as applications and brochures;
e) Building relationships – answering questions, encouraging callers to apply;
f) Research and Analysis – Using "Heard By" feature; monitoring results by actual clicks on website and call logs; and
g) Nurturing leads

The social media campaign involves a re-design of HAC's website to have a "Fresh Content" and "What's New" area and to have clear, consistent navigation pages and fillable forms. It also involves coordination and discussion with County staff and appropriate linkages. We are currently evaluating several firms to assist HAC in this effort, including the following:

Tom Martin
Tom Martin Media
123 Fifth Avenue, 3rd Floor
New York, New York 1003

Robin Colner
DigiStar Media
600 Mamaroneck Avenue, Suite 400
Harrison, New York 10028

Carolyn B. Mandelker
Harrison Edwards Public Relations & Marketing
51 Babbitt Road
Bedford Hills, New York 10507

Identification of Key Personnel

The Housing Action Council's Marketing Consulting Services will be managed by **Rose Noonan**, its Executive Director. Ms. Noonan has over 30 years in the affordable housing industry beginning her career with the National Leased Housing Association in Washington, DC., moving to HUD and to the New York State Division of Housing and Community Renewal, and then to the Housing Action Council. She is a graduate of Pace University Law School and an attorney licensed to practice in New York State. She is also a licensed real estate broker.

She has extensive experience in affirmatively marketing housing developments in accordance with Federal and State requirements as well as Westchester County's requirements pursuant to the Settlement Agreement. She has developed affirmative marketing plans and guided the marketing of thousands of rental and for-sale homes in the region, including designated affordable housing developments of varying sizes, inclusionary units in market rate developments, and one to four family units. She also managed the City of Yonkers' compliance with a Housing Remedy Order which included providing access to rental and ownership opportunities for over 500 beneficiaries of a class action lawsuit in neighborhoods where the percentage of African American/Black and Hispanic/Latino populations were low. She designed a comprehensive counseling program with a mobility component.

She also has designed and conducted numerous workshops on fair and affordable housing in conjunction with Pace Land Use Law Center. She is responsible for managing the dialogue and training on affirmative marketing in these workshops. She has served as an Adjunct Professor at Pace Law School teaching a course on Housing Development and Discrimination. She is a certified Housing Counselor.

Ms. Noonan will be assisted by **Gaitre Rambharose**, Marketing Assistant. She joined Housing Action Council in 2004 and is responsible, under the Executive Director's guidance, for the preparation and distribution of marketing materials for fair and affordable housing developments. She has identified and developed relationships with the media to assure that advertisements are properly priced and placed in publications and other venues to reach target populations. She has designed a flexible data collection system that meets the guidelines of the Westchester's Affirmative Marketing Program and she is responsible for maintaining the system and generating reports. She manages direct and in-person contact with people who are interested in fair and affordable housing developments and often is a liaison with developers for intake analysis and data collection. In addition, she is responsible for maintaining HAC's outreach list used to inform people throughout the New York metropolitan area of fair and affordable housing developments. She oversees **Kevin Thomas** who assists in distribution of

marketing materials and handles phone and in-person contact with interested applicants and data input. **Mr. Thomas** joined HAC in 2010.

Terry Fleischman is the Director of HAC's Housing Counseling Program. Ms. Fleischman joined the Housing Action Council in 2005 and has successfully engaged low and moderate income households in counseling to take advantage of homeownership and rental housing opportunities throughout the New York Metropolitan area. She has established relationships with community organizations, civic associations and libraries as settings for workshops, open houses, and fairs as well as distribution points for information about housing developments. She organizes and delivers workshops on a regular basis. She has strong linkages with community organizations in the New York City boroughs and is often called on by her peers to present and discuss "best practices" for outreach and engaging "Least Likely to Apply" populations in counseling and apply for affordable housing developments. She manages Counselor Max which is a data collection and reporting system that can feed into HAC's specific data collection system for fair and affordable housing developments. She has a working knowledge of HUD, including the HUD Handbook 8025 and New York State Housing Programs and the Westchester County Settlement, with respect to marketing and qualification of applicants. She is responsible for HAC's compliance with HUD requirements. She is a certified Housing Counselor.

She directs **Frengiz Surty** who is also a certified Housing Counselor. She joined Housing Action Council in 2008 and has developed strong relationships with the media, New York City Library System, and constituent representatives in Federal and State offices throughout the New York Metropolitan Area. She periodically appears on radio and government access channels engaging people in counseling and affordable housing opportunities.

Lucy Ortiz is a staff associate who is currently conducting outreach, counseling, and certification for HAC's Rental Assistance Program. She is actively pursuing employment in the public sector, including the County of Westchester, but has agreed to work with HAC on a marketing program on a part-time basis and as needed. Ms. Ortiz has an indepth knowledge of the HUD regulations as they relate to fair housing and affirmative marketing and was involving in the initial designs of the County's Plan and reviewed and monitored affirmative marketing plans for specific developments.

Tony Hoeltzel is Director of the Community Housing Resource Center Program. Mr. Hoeltzel was appointed Director of the Community Housing Resource Center in 2008. Prior to that, Mr. Hoeltzel served for 20 years as Executive Director of The Sharing Community in southwest Yonkers. Under his leadership, The Sharing Community grew from a simple homeless shelter and a soup kitchen into a large multi-service community-based agency . He is an Episcopal priest by vocation. He holds a M.Div. degree from General Theological Seminary in New York City, with a concentration in systematic theology.

Mr. Hoeltzel will be particularly involved in the tasks that involve consulting with municipal leadership and community contacts and outreach to local civic organizations. This is further explained in the Experience section of this proposal.

Ken Inadomi, Executive Director of the New York Mortgage Coalition. As noted in the attached letter, the New York Mortgage Coalition will collaborate with the Housing Action Council in providing

marketing consulting services. This relationship will provide a base for assuring that affirmative marketing efforts are designed to be effective throughout the 9 county area with broad based channels of distribution. Mr. Inadomi joined the New York Mortgage Coalition in 2008 and has nearly tripled its funding and activities. His experience with NYMC and his business background in sales will be drawn upon in the design and implementation of affirmative marketing plans. He will manage the public relations/social media expertise that will be available to HAC through the NYMC as will the expertise of the Data Collection Specialist which he also oversees.

Experience

The Housing Action Council is a regional not-for-profit organization charged with addressing the housing and housing related needs of low and moderate income households, including households with special needs. Its primary role is that of a catalyst – providing the infrastructure to community organizations, human service organizations, housing authorities, and not-for-profit and for-profit developers – to develop and market successful housing developments. Its mission also includes working with all levels of government and coalitions to design and implement program solutions to the region's housing needs, as well as education and networking. The Housing Action Council was established in 1974. HAC services relevant to this RFP are our marketing, including community outreach and mobility counseling services; housing counseling and access to affordable housing developments; and relocation services.

The Housing Action Council has extensive experience in developing and implementing affirmative marketing plans. Below is a sampling of the experience:

Yonkers Affordable Housing Program – By the settlement reached in *U.S. v Yonkers*, 80 CIV 6761(LBS), the City of Yonkers was responsible for designing and implementing programs that provided affordable housing opportunities for the plaintiff class (African Americans/Blacks and Latinos/Hispanics) in areas with low minority concentrations. These opportunities were created through a Home Purchase Assistance Program, a Rental Assistance Program modeled after the Housing Voucher Program, and the construction of four affordable housing developments. The City secured the services of Housing Action Council and appointed HAC as the Manager of the Yonkers Affordable Housing Program. HAC successfully guided the City to compliance with the Housing Remedy Order and accomplished over 600 pro-integrative moves. The services included designing and implementing an outreach program coupled with a mobility counseling program. Although this case was settled in 2007, HAC continues to administer the Rental Assistance Program and handles the re-sales under the Home Purchase Assistance Program and rentals in one to four unit developments. HAC also conducts an on-going outreach effort to have a pool of interested applicants for the Rental Assistance Program and re-sales.

Affirmative Marketing/Implementation (Affordable Housing Developments) – The Housing Action Council has a long track record of outreach, marketing, and qualifying households for affordable rental and homeownership developments and programs. Some developments are located in high opportunity areas such as Scarborough Glen in the Village of Briarcliff Manor and in the Town of Cortlandt and Villages of Ardsley and Hastings-on-Hudson. Others are in areas of Yonkers where the percentage of African Americans/Blacks and Hispanic/Latinos is low, namely Sprain Lake Estates (34 townhomes of

which 17 are affordable), Hoover Road Townhomes (10 two family homes of which 5 are affordable), St.James Gardens (64 rental apartment of which 32 are affordable) and Cross Street Condominium (22 condos of which 13 are affordable). Recent experience includes a 92 rental housing development in the Town of Cortlandt, 72 rental apartments in Somers (The Mews at Baldwin Place), 18 condominiums in Rye (Village of Rye), a single condominium unit in Pleasantville and a two family home in Pelham.

These developments included preparation and implementation of affirmative marketing plans in compliance with Federal and State requirements and in some case with Settlement Agreements. These developments represent a variety of sizes and tenure and include designated affordable housing developments and inclusionary developments. They required extensive outreach and engagement of target populations as well as counseling. The extensive outreach to Least Likely to Apply populations resulted in significant numbers of LLA populations applying to and moving into these developments.

Affirmative Marketing/Implementation (Scattered Site) – The activities of Housing Action Council's Counseling Program, in particular its Homeownership Counseling Program, demonstrates its experience to carry out the RFP's scope of work. HAC conducts extensive outreach throughout Westchester County and the Bronx to engage people in its counseling programs. It targets those who are under-represented in homeownership and provides the counseling and tools to enable individuals to achieve ownership in areas of their choice. Fair housing and mobility counseling are components of the counseling which are delivered in workshops and one on one. The counseling also provides the opportunity for HAC to make clients aware of fair and affordable housing developments and opportunities in the existing market. Roughly 65% of HAC's counseled clients are African American/Black or Hispanic/Latino. Approximately 300 households are counseled annually with 60 to 75 households helped to homeownership, many of whom move into areas of high opportunity.

Municipal Housing Authority of the City of Yonkers – The Housing Action Council managed the relocation of over 400 households from Mulford Gardens, a public housing development slated for demolition with replacement with mixed income housing. The relocation plan included a mobility component specifically focused on transitioning households from rental housing to homeownership in low-poverty, low-minority neighborhoods. With the exception of one, all purchasers of the affordable townhomes at Sprain Lake Estates, a development in Northeast Yonkers, have been sold to former residents of public or subsidized housing developments in Southwest Yonkers.

Community Housing Resource Center – The Housing Action Council also hosts the Community Housing Resource Center which is an initiative dedicated to building a more favorable climate in local communities in Westchester County for fair and affordable housing. It provides information and technical assistance in constructive ways to local public officials and interested residents to develop affordable housing plans that will receive broad-based community support and to provide a network for those who reside or who wish to reside in the developments created in those communities. The following experiences relates to specific work items in the Scope of Services:

> **"CONSULT WITH MUNICIPAL LEADERSHIP AND COMMUNITY CONTACTS..." (p.2-3)**

Housing Action Council (HAC) is an acknowledged leader in providing technical assistance to municipal leaders and key community contacts on ways to advance fair and affordable housing and specific affordable AFFH developments in their communities. In this capacity HAC has assisted in the creation of tens of thousands of affordable housing units.

The conversation flows both ways: municipal officials seek HAC's assistance and HAC approaches officials and leaders when affordable AFFH opportunities arise.

Through its Community Housing Resource Center (CHRC) HAC maintains current, up-to-date directories for nearly every Westchester community of elected municipal officials and appointed members of boards, grassroots advocates, leaders of faith communities, business leaders, and leaders of civic and neighborhood organizations. HAC and CHRC maintain ongoing relationships at any given point in time with leaders in 20-25 Westchester municipalities.

HAC partners with CHRC and the Pace University Land Use Law Center to provide the 3-day intensive Land Use Leadership Alliance training program, which provides invited local leaders with training in land use strategies to create fair and affordable housing and to develop consensus around its need and benefits in the local community. This program has been instrumental in identifying and giving the requisite tools to local leaders throughout the County and region.

With an active member of the clergy on staff, HAC and CHRC are able to effectively conduct outreach and engagement of faith community leaders, local clergy associations, and denominational hierarchies to provide education around the benefits of diversity and to organize advocacy for the approval of specific affordable AFFH proposals. CHRC produced and distributes an interfaith educational background piece – "Thinking Theologically About Fair & Affordable Housing" – to assist clergy and faith community leaders in the education of their congregations around the value of fair and affordable housing from a faith perspective. CHRC has begun engaging clergy and faith leaders to plan welcoming events for new residents in communities where affordable AFFH housing units are in development.

"CONDUCT OUTREACH TO LOCAL CIVIC ORGANIZATIONS...." (p.2-5f.)

HAC and CHRC have many years of experience identifying and engaging local advocates and advocacy organizations to advance fair and affordable housing in Westchester, and have served as affirmative marketing consultant on many fair and affordable housing developments. These activities, in fact, are among CHRC's and HAC's special expertise.

HAC and CHRC use every available means of communication – mailings, workshops, telephone, email, websites, etc. – to advertise the availability of affordable AFFH homes, and will use the same in engaging local civic organizations, neighborhood associations, faith-based organizations and other groups in consultation with municipal leaders and community contacts to encourage community members to welcome applicants and new residents of the housing.

Through their broad existing, but ever-growing, networks of community leaders, houses of worship, municipal leaders, and grassroots fair and affordable housing advocates, HAC and

CHRC have a ready-made market distribution base as well as a core on which to build voices of welcome to new residents of the communities in which affordable AFFH homes are created. A variety of events will be coordinated to bring together new residents and representatives of the 'host' community.

The 'Homes for Westchester' Communitywide Benefits Strategy Group, co-led by CHRC, is preparing a succinct educational piece which summarizes various studies enumerating and documenting the benefits of racial, ethnic, and economic diversity on receiving communities.

New York Mortgage Coalition – As explained elsewhere in this proposal, the New York Mortgage Coalition is collaborating with the Housing Action Council to design and implement affirmative marketing plans. Attached is a description of the NYMC. In addition to the services of the NYMC staff, HAC will draw upon the services of its Public Relations/Social Media consultant (Bridge Global Strategies).

NYMC has a twitter account, a FaceBook page, and a Linked in account. NYMC recently hired a Program Assistant to spear head its social media campaign. She is responsible for tweeting relevant information to followers and updating the FaceBook page. NYMC has also successfully used 60 second radio spots to reach out to potential customers. It has recently worked with 1010 WINS to create a radio campaign which can be expanded to include the proposed affirmative marketing plan.

HAC Relevant Memberships

New York Mortgage Coalition
New York State Coalition for Excellence in Homeownership Education
Hudson Gateway Association of Realtors
New York State Association of Realtors
National Association of Realtors
Hudson Gateway Multiple Listing Services
National Low Income Housing Coalition
Westchester Women's Agenda
Cornerstone Partnership

Adopter of the National Industry Standards for Homeownership Education and Counseling – These standards are a set of guidelines for quality homeownership and counseling services.

HAC Relevant Credentials
Licensed Real Estate Program (HAC and Rosemarie Noonan)
HUD Certified Housing Counseling Agency
Rosemarie Noonan, Terry Fleischman & Frengiz are Certified Housing Counselors
Rosemarie Noonan is a licensed attorney authorized to practice law in the State of New York
Co-sponsor of Pace Land Use Law Center Leadership Training – Affordable Housing

Continuing Education – Staff regularly participates in
NeighborWorks Training Institute

Fair Housing Training
CounselorMax Technology Training
HUD Compliance Training which includes Fair Housing, Affirmative Marketing, and Counseling

August 23, 2012

Norma V. Drummond
Deputy Commissioner
Westchester County Department of Planning
148 Martine Avenue, Room 414
White Plains, NY 10601

Dear Ms. Drummond:

The New York Mortgage Coalition (NYMC) is pleased to collaborate with Housing Action Council (HAC) to deliver marketing consulting services to Westchester County and to developers of fair and affordable housing.

NYMC is a not-for-profit coalition of community organizations and lending institutions dedicated to increasing access to housing for the under-served and under-banked populations in the New York Metropolitan Area. Our community partners currently cover New York City's 5 boroughs, all of Long Island, and Westchester, Rockland, Putnam, and Dutchess counties – we also have near term plans to expand into Connecticut and New Jersey. Over the years HAC has demonstrated a strong commitment and excellence in outreaching to the African American and Black, Hispanic/Latino, and other populations who are least likely to know about and qualify for housing programs. NYMC was founded in 1993 for the purpose of delivering outreach and counseling services to these populations and HAC, a founding member, has consistently been one of our most productive partners.

NYMC is a HUD-certified housing counseling program. As you may know, our program focuses on expanding and preserving homeownership opportunities; however, we are also prepared and enthused to support HAC in marketing consulting services that relate to affordable rental housing. The same services, relationships, and outreach tools available through NYMC's broad network of counseling agencies can be positioned to serve those who are interested in homeownership <u>or</u> rental housing.

Please review the following services and support areas that NYMC will provide to HAC in connection with its marketing consulting services:

- ☐ NYMC outreach to Least Likely to Apply (LLA) populations through our network of community partners which, in addition to HAC, currently includes: Asian Americans for Equality (Manhattan, Queens, and Brooklyn); CHHAYA Community Development Corp. (Queens); Cypress Hills Local Development Corp. (Brooklyn); Harlem Congregations for Community Improvement; Long Island Housing Partnership; Neighbors Helping Neighbors (Brooklyn); Northfield Community Local Development Corp. (Staten Island); and Pratt Area Community Council (Brooklyn). Some of these organizations are neighborhood-based, while others operate county-wide and even city-wide.

- ☐ NYMC's community partners have agreed to serve as distribution channels for information on Westchester's Fair & Affordable Housing Developments. Though we are united as a coalition, each of NYMC's partners maintains their separate client bases, websites, and local media strategies – and most use social media to varying degrees. Our partners are approved HUD counseling agencies, are experienced in conducting housing workshops and housing fairs at the neighborhood level, and are actively committed to the principles of fair housing and affirmative marketing.

- ☐ NYMC Outreach and Plan Design: In helping HAC execute its marketing strategy, NYMC agrees to the following:
  - We will assist HAC in coordinating the efficient participation of NYMC's network of community partners.
  - We will refer all relevant housing inquiries to HAC. Through our regular outreach programs, people routinely contact NYMC about housing services – we will continue referring them to our community partners, including HAC.
  - We will post Westchester's Fair and Affordable Housing Developments on our website (www.nymc.org). We can also post regular updates regarding the Westchester initiative as well as create a link that re-directs web traffic to the www.westchester.gov/homeseeker-opportunies site.
  - We will enroll the services of our public service relations firm Bridge Global Strategies (www.bridgeny.com) at appropriate times to advise HAC on its outreach efforts, including the preparation and distribution of press releases, as well as the placement of editorial content where possible.
  - We will leverage NYMC's many collaborative partnerships to assist HAC in implementing affirmative marketing plans, including working with the Housing Partnership Network, NeighborWorks, Neighborhood Housing Services of New York City, the Association for Neighborhood Housing Developers, and the Center for New York City Neighborhoods. These organizations are intermediaries with memberships and/or constituencies dedicated to addressing the needs of low and moderate income households

- We will also outreach to several of our union relationships, including 1199 SEIU and Teamsters Local 237, to distribute information about fair and affordable housing developments.
- We will tap into the power and cost-efficiency of social media to expand the market reach of our message. NYMC staff is adept in a range of social media tools including Twitter, Facebook, and LinkedIn – all of which can be implemented to promote HAC's fair housing programs.

☐ Convene one or more meetings, including evaluation meetings, of our community partners, participating lending institutions, and representatives from the organizations and institutions listed above to assist HAC on further development of the Affordable Fair Housing Marketing Plan. Our objective is to formulate effective approaches to engage LLA populations in taking advantage of opportunities in neighborhoods where the percentages of African American/Black and Hispanic/Latino populations have been traditionally low. NYMC will work with HAC to identify representatives with marketing skills and relevant experience with emerging markets, as well as those who are culturally competent to participate in these efforts.

☐ We will also convene an informational meeting on Fair Housing and Affirmative Marketing for our participating community organizations and lenders. NYMC regularly schedules workshops to assist our partners in executing housing activities at the local level. We would be happy to incorporate such a workshop into our annual training calendar and open up this workshop to include other organizations and interested individuals whose impact and influence carry into Westchester County.

The New York Mortgage Coalition and its community partners are aware of the Westchester County Settlement and its affirmative marketing plans. Rose Noonan keeps us regularly informed and has effectively used NYMC and the other community partners to distribute important information and updates. Heretofore we have worked together on an informal basis; we are now ready and prepared to work together on a formal basis, as outlined above. Please feel free to contact me with any further questions.

Sincerely,

Ken Inadomi
Executive Director
Ken.I@nymc.org
212.742.0762

Westchester County RFP
Marketing Consulting Services
8.23.2012

NEW YORK MORTGAGE COALITION

The New York Mortgage Coalition (www.nymc.org), a nonprofit organization, is a unique collaboration of financial institutions and community housing agencies dedicated to helping low- to moderate-income families become first-time homebuyers in the Greater New York (New York City, Long Island, and the Hudson Valley) area. Through financial workshops and one-on-one counseling, NYMC's housing groups prepare qualified borrowers for responsible homeownership.

While focused principally on homeownership opportunities, the Coalition's nine not-for-profit affiliates provide an effective network for outreach and marketing of fair and affordable rental housing opportunities for households who decide not to pursue homeownership. The affiliates have a broad geographic representation and serve a variety of racial and ethnic populations.

IN ADDITION TO HOUSING ACTION COUNCIL, THE FOLLOWING COMMUNITY GROUPS ARE AFFILIATES OF THE NEW YORK MORTGAGE COALITION

1. ASIAN AMERICANS FOR EQUALITY

   Manhattan Office: 111 Division Street, NY, NY 10002. 212/964-2288
   Queens Office: 133-04 39th Avenue, Flushing, NY 11354. 718/961-0888
   Brooklyn Office: 807 48th Street, Brooklyn, NY 11220. 718/686-8223

   Asian Americans for Equality (AAFE) is a non-profit organization dedicated to enriching the lives of Asian Americans and all of those who are in need. Founded in 1974 to advocate for equal rights, AAFE has transformed in the past four decades to become one of New York's preeminent housing, social service and community development organizations. AAFE is committed to preserving affordable housing throughout New York and to providing new opportunities for the city's diverse immigrant communities. Employing innovative approaches, the organization has preserved and developed 86 buildings, creating more than 700 units of housing. It has secured almost $250 million in mortgage financing for home buyers and disbursed $13 million in loans to hundreds of small businesses. Through a wide range of multilingual counseling services, AAFE provides education, financial assistance and training to empower people, small businesses and neighborhoods. Its research, advocacy and grassroots organizing initiatives help to shape government policy and to effect positive change. At its heart, AAFE embodies the hopes and dreams of New York's many vibrant immigrant communities, and helps turn those dreams into reality.

2. CHHAYA COMMUNITY DEVELOPMENT CORPORATION

   37-43 77th Street, Jackson Heights, Queens, NY 11372. 718/478-3848

   Chhaya's mission is to create more stable and sustainable communities by increasing civic participation and addressing the housing and community development needs of New York's South Asians, new immigrants and their neighbors.

South Asian Americans, a group that includes immigrants from India, Bangladesh, Pakistan, and Caribbean nations such as Guyana and Trinidad, are New York City's second-largest Asian community. These newest New Yorkers have a wide range of service needs. All of Chhaya's services are offered in Bangla/Bengali, English, Hindi, and Urdu.

Chhaya works in the following key housing and immigration-related areas: homeownership education and counseling; financial fitness; tenant rights organizing, education, and counseling; voter engagement; and assistance with housing discrimination or harassment.

3. CYPRESS HILLS LOCAL DEVELOPMENT GROUP

625 Jamaica Avenue, Brooklyn, NY 11208. 718/647-2000

Cypress Hills Local Development Corporation (CHLDC) was formed in May 1983 by a group of activist residents and merchants. CHLDC is a 501[c]3 nonprofit community-based organization, serving more than 8,000 residents each year through a comprehensive array of community service programs and neighborhood development projects. CHLDC's mission is to revitalize the Cypress Hills community through housing preservation, economic development, and the positive development of youth and families.

4. HARLEM CONGREGATIONS FOR COMMUNITY IMPROVEMENT

2854 Frederick Douglass Boulevard, NY, NY 10039. 212/281-4887

Founded in 1986, HCCI is a 501[c]3 not-for-profit coalition of more than 90 inter-faith congregations that has implemented a comprehensive portfolio of programs to provide affordable housing and safe streets; offer opportunities for individuals and groups to become and remain economically independent; increase understanding of and access to health care; and provide substantive educational programs for adults and young people. Through alliances with other community organizations, elected officials and local residents, HCCI has also helped reduce crime in the community; increase public sanitation; and preserve and transform open space.

Leveraging more than $240 million in support from federal, state, and city agencies, HCCI's real estate office has developed more than 2,000 units of low, moderate and middle-income housing and nearly 40 commercial spaces including a 45,000 sq. ft. Pathmark supermarket. HCCI's health office provides scattered-site housing for 60 families and individuals living with HIV/AIDS. HCCI's adult education programs include soft employment skills, literacy training (in conjunction with Literacy Partners), and computer software training--all linked with job placement. To date, HCCI has placed more than 1500 residents in employment opportunities.

5. LONG ISLAND HOUSING PARTNERSHIP

180 Oser Avenue, Hauppauge, NY 11788. 631/435-4710

Long Island Housing Partnership, Inc. was created to address the need for and to provide affordable housing opportunities on Long Island for those who are unable to afford homes, through development, technical assistance, mortgage counseling, homebuyer education and lending programs.

Prospective homebuyers who meet maximum annual income restrictions and qualify for private mortgage financing are selected by lottery or computerized random number generating systems, and then on a first come first serve basis, if additional applicants can be accommodated. Technical assistance is provided to private developers, municipalities and other not-for-profits who are providing affordable housing on Long Island.

6. NEIGHBORS HELPING NEIGHBORS

443 39th Street, Suite 202, Brooklyn, NY. 718/686-7946

Neighbors Helping Neighbors' mission is to empower low- and moderate-income Brooklyn residents to secure quality housing and build financial assets.

NHN provides education and counseling to enable people to help themselves; organizes residents to act together to help one another; networks with other community organizations; and serves as an advocate and conduit of resources in the Brooklyn community.

7. NORTHFIELD COMMUNITY LOCAL DEVELOPMENT CORP.

160 Heberton Avenue, Staten Island, NY 10302. 718/442-7351

The mission of Northfield Community LDC is to enhance the quality of life within the community through:

- Development of affordable housing
- Rehabilitation and improvement of the existing housing stock
- Energy conservation improvements and testing for safety in buildings
- Promotion of economic development and financial literacy education
- Support of homebuyer and foreclosure prevention efforts

8. PRATT AREA COMMUNITY COUNCIL

Main Office: 201 Dekalb Avenue, Brooklyn, NY 11205. 718/522-2613

PACC is a community development corporation that contributes to the development of the good community through three major strategies:
First, PACC seeks to preserve and create affordable housing, because fulfilling the fundamental right to affordable housing is a cornerstone for establishing human well-being, preventing displacement, and enhancing economic, racial, and cultural diversity.
Second, it seeks to promote and support the development of small businesses and vibrant commercial corridors, because such economic development is an engine of opportunity that can create jobs for community residents, bring better services to our neighborhoods, and otherwise enhance our community as a place to live.
Third, PACC seeks to inform, to organize, and to galvanize members of the community, because residents, acting together toward common objectives, can oppose unnecessary displacement, demand accountability from private developers and public officials, and otherwise contribute to the greater good.

Ken Inadomi
607 West End Avenue, 9A
New York, NY 10024

Office: 212.742.0762 Ken.I@nymc.org

NEW YORK MORTGAGE COALITION, New York, New York 2008 to Present
Executive Director
Responsible for management and growth of homeownership counseling program dedicated to helping low to moderate income families in the greater New York region become first-time homebuyers. Oversee collaboration of nine lenders and ten nonprofit housing agencies providing counseling to over 3,000 LMI families per year, with over 600 becoming first-time purchasers. Coalition agencies also provide foreclosure prevention counseling, assisting 3,600 homeowners facing default over the past 18 months. Total program funding has more than doubled, from $583,000 to $1.3 million, within two years.

CIS - CONSOLIDATED INFORMATION SERVICES, Allamuchy, New Jersey 1992 to Present
Owner
CIS, one of the largest independent credit reporting agencies in the US, provides mortgage settlement services to over 1,000 lenders nationwide through proprietary 24/7 internet delivery. Products and services include credit scores, credit reports, credit simulation modeling, tax return verifications, on-line property valuations, pre-employment screenings, and public records.

TECHCOM INC., Westport, Connecticut 1984 to 1989
Publisher and Owner
Directed editorial content and advertising sales of two international medical publications across Asia, Europe, and USA.

WARNER AMEX COMMUNICATIONS, New York, New York 1982-1983
Director of Cable Sports Programming
Managed the development and distribution of pay-cable sports networks in New York, Houston, Dallas, and Pittsburgh.

HOME BOX OFFICE, INC., New York, New York 1980-1982
Manager of Sales Planning and Analysis
Participated in national sales and marketing of the HBO pay-cable package and the nation-wide rollout of Cinemax.

KIIS-AM Los Angeles, California 1977
Radio Disk Jockey
Drive-time DJ, Top 40 format.

Education

YALE COLLEGE
BA Economics 1976

STANFORD GRADUATE SCHOOL OF BUSINESS
MBA 1980

KIMBERLY V. ALLMAN
175 Willoughby Street • Apartment 12D • Brooklyn, New York 11201 • 718-208-8163 • kimberly.allman@gmail.com

EDUCATION

Boston University Program for Financial Planners
Certificate in Financial Planning, July 2010

Cornell Law School, Ithaca, New York
Juris Doctor, Concentration in Advocacy, May 2005
Honors: *Cornell Journal of Law and Public Policy*, Senior Note Editor

Duke University, Durham, North Carolina
Bachelor of Arts in Psychology and Political Science, May 2001
Minor in African and African American Studies, May 2001
Honors: Dean's List

HOUSING CERTIFICATIONS

- Certified by NeighborWorks in Homeownership Counseling for Program Managers and Executive Directors
- Certified by NeighborWorks in Foreclosure Intervention and Default Counseling
- Certified by NeighborWorks in Housing Counseling

EXPERIENCE

New York Mortgage Coalition, New York, NY
Deputy Director, January 2012 - Present
Director of Programs and Compliance October 2010 – January 2012
Manager of Homeownership Preservation, March 2009 – October 2010

- Oversee the homeownership program, foreclosure prevention program and financial literacy program
- Serve as General Counsel which includes drafting, reviewing and maintaining internal legal and compliance documents such as contracts, whistle blower policy, document retention policy and conflict of interest policy
- Update and maintain procedures manual and ensure proper compliance and best practices across 11 non-profit housing counseling agencies
- Organize and coordinate quarterly trainings for 11 non-profit housing counseling agencies
- Serve as a consultant and adviser to the foreclosure prevention programs of 20 non-profits in New York City to help the organizations better serve their clients. Evaluate and assess the foreclosure prevention programs, provide technical assistance and make recommendations for program and counselor improvement to the individual organizations and to the Center for New York City Neighborhoods
- Plan and conduct trainings and programs on legal issues, compliance issues, government programs and best practices pertaining to foreclosure and housing issues to housing counselors throughout the New York Metro Area
- Plan, implement and manage workshops and outreach sessions throughout the New York Metro Area to educate homeowners on credit issues, loan scams and options available to avoid foreclosure
- Redesigned the audit and compliance process for the New York Mortgage Coalition's 11 pre-purchase and post-purchase housing counseling agencies and conduct audits to ensure compliance with state and federal requirements
- Serve on the steering committee of the New York State Coalition for Excellence in Homeownership Education
- Represent NYMC in policy and advocacy proceedings

Sidley Austin LLP, **New York, NY**
Corporate Associate, September 2005 – March 2009
Summer Associate, Summer 2004

- Advised clients on investment products including mutual funds, hedge funds, structured products and real estate investment trusts
- Drafted offering memoranda, limited partnership agreements and limited liability company agreements
- Supervised and trained junior associates with regard to structured products and hedge fund assignments
- Served on the Summer Associate Planning Committee from 2006-2007

- Planned women's mentoring group events and mentored summer associates regarding work assignments and choosing a practice group
- Planned and presented a program to first year associates about transitioning from student to lawyer

Pro Bono Work

- Represented low-income clients in a capital trial case and a political asylum case
- Non-profit incorporation
- Researched legal issues, gathered evidence, interviewed clients and drafted motions and petitions

Deutsche Asset Management, Legal Department, New York, NY
Seconded In-house Lawyer, April 2008 – July 2008

- Negotiated swaps and derivatives agreements between Deutsche Asset Management and investment banks
- Revised and drafted documents and contracts for investment trusts

Cornell Law School, Career Services Office, Ithaca, New York
Intern, September 2004 – May 2005

- Organized and posted job opportunities for students
- Observed process of assisting law students to find and apply to legal positions
- Updated and maintained lists detailing alumni employment information

Cornell University, Department of Applied Economics and Management, Ithaca, NY
Teaching Assistant, September 2003 – May 2004

- Assisted students with the coursework for Business Law I and II (course topics included business associations, contract law, property law and corporate law)
- Graded exams and papers
- Held office hours to assist students with questions and difficulties

MEMBERSHIPS

Coalition for Debtor Education
Volunteer, October 2009 – Present

Black Ivy Alumni League
Volunteer, July 2010 – Present

- Coordinated and organized legal roundtables in multiple cities to advise entrepreneurs on business law

New York City Civil Court Housing Part Advisory Council
Member, February 2010 – Present

Metropolitan Black Bar Association
Member, October 2009 – Present

Brooklyn Bar Association
Volunteer with the Foreclosure Prevention Project, October 2009 - Present

ADMISSIONS

New York State, 2nd Judicial Department, 2006

HONORS & AWARDS

Thurgood Marshall Award for Capital Representation, 2008

Michael S. Maloney
132 Allen Street, Apt 3C, New York, NY 10002
(407) 383-2136, Michael.Stephen.Maloney@gmail.com

SUMMARY

Statistical analyst with several years of experience providing analysis, research, and technology solutions. Skilled in the creation and maintenance of complex databases in a variety of formats and uses.

EDUCATION

M.A. Sociology, FORDHAM UNIVERSITY, Graduate School of Arts and Sciences May 2011
Double focus on Urban Ethnography and Statistical Analysis, graduation pending acceptance of thesis. Important work::

- Thesis work on informal and illicit marketplace dynamics; researched illegal markets in the NYC area and their proximate and secondary effects on the legal market, including the transition of profits back into the formal economy
- Completed four semesters of statistics coursework, and two full research projects requiring both supporting and original research using large datasets
- Completed two years of Sociology Master's work through 2010.

B.A. Sociology and Anthropology, FORDHAM UNIVERSITY, Fordham College at Rose Hill May 2008
Graduated with honors, 3.63 GPA

PROFESSIONAL EXPERIENCE

New York Mortgage Coalition Data Reporting Manager Jan 11 - Present
Oversaw all data reporting and analysis for multiple projects at NYMC. Created a custom reporting system for 12 housing agencies, and presented findings directly to 13 financial institutions. Directly interacted with all board members, facilitating data requests, special events, quarterly meetings, and project updates. Accomplishments include:

- Reduced timeline for compliance confirmation of Federally required CRA loan commitments from three months to two weeks; financial institutions were able to report CRA credit by quarter instead of yearly totals.
- Integrated custom reporting forms to automatically populate data concurrently into two proprietary and one original database

NYC Dept of Housing Preservation and Development Project Manager Mar 09 – Dec 10
Worked as a graduate Research Assistant, eventually becoming a Project Manager for the NYC Housing and Neighborhood Study (HANS). Tasked with creating and maintaining the study databases, was also responsible for agency-wide statistical analysis requests and gathering research relevant to HANS. Specific projects include:

- Developed and maintained a database of complex survey, administrative, and map data for the NYC Housing and Neighborhood Study; this Access database combined several data types from multiple agencies and research partners into one cohesive set of tables
- Analyzed the statistical significance and correlation coefficients of multiple variables related to the health outcomes of those living in fair housing. Variables positively matching these criteria will be experimentally measured by HANS
- Presented research on the economic effects non-banking financial institutions have on the urban poor, particularly the cycle of predatory lending made possible by a non-regulated industry
- Designed research protocols for baseline and follow-up surveys, choosing analytical and research methodologies for the HANS study that will be used to assess public housing throughout the U.S.A.

UNITHRIVE (formerly KR Student Loans) Technology Consultant Nov 09 – Jul 10
Assisted in the merger of KR Student Loans with UniThrive, a non-profit, micro-financing student loan organization. Required to write documentation of the prior web developer's code and facilitate the creation of a new website. Oversaw vendor selection and the hiring of new full-time developers. Accomplishments include:

- Wrote VBA macros that transferred the previous XML databases into a new SQL database, fixing relational errors
- Selected the current web developers and standards used for the UniThrive website; expanded the web team to three full-time programmers who now implement a more secure website using PHP and Ruby on Rails

TECHNICAL SKILLS

- Completed an online course (December 2011) on Database Management and Analysis Certification course offered by Stanford School of Engineering; course material covered relational algebra, advanced XML Schema, SQL query and database creation, as well as future expected developments in the field.
- Statistical Package for the Social Sciences (SPSS) and Analytical Modeling (AMOS) software: Advanced statistical analysis to identify significant variables, causation/correlation, and data patterns

- SQL programming language, XML, and HTML scripting languages: Experienced with creating and querying large databases. Familiar with C, PHP, Ruby on Rails, and Python programming languages documentation
- Microsoft Project: Managed project budgets and timelines, while rapidly responding to changes in funding and goals
- Microsoft Office: Expert user of full Office Suite including Excel, Word, and Power Point

LEADERSHIP

Selected to be a Senior Leader for NSP Bronx while in College; oversaw a staff of 20+ volunteers committed to volunteering between 5 and 20 hours a week, with over 300 clients served annually – a three-fold increase from the prior year.

Carolyn Rebecca Senn
687 Sackett Street
Brooklyn, NY 12117
Rebecca.senn@me.com

EDUCATION

Centenary College, Hackettstown, New Jersey
Bachelor of Arts: Double Major
January 2011
Major: Sociology
Concentration: Human Services
Major: Governmental and Political Affairs
Minor: History
GPA 3.7/4.0
Fordham University, New York, NY
Master's – Urban Studies (current)

RELATED EXPERIENCE

- Grants Administration Intern, New York Council for the Humanities
- 150 Broadway, New York, NY
- February 2012- to present
- Duties include: FileMaker data entry, email/phone correspondence, paperwork tracking, review-meeting materials preparation, and website updates

Worked for the State of New Jersey Governor's Office

- Health Policy Intern
- August 2009 to January 2010
- Communicated with Government Officials
- Charted draft memo's for the Health Policy Advisor to Governor Corzine
- Constructed and consolidated research material for presentations
- Analyzed and summarized research on the Marriage Equality Bill

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SKILLS

- Superior writing and editorial skills
- Excellent command of English language, grammar, syntax, and content
- Expert level in Microsoft Word, Power Point, Excel, Internet and E-mail, Social Networking, SPSS, VBA, Adobe Acrobat, Adobe Contribute
- Computer and Knowledge Management including GIS mapping
- Excellent qualifications in extrapolating, analyzing, and reporting facts
- Proven success in independently managing projects and meeting/exceeding all milestone and deadlines
- Hands on skills in full range of research techniques and activities

- Hands on skills in research assistant activities
  Extremely detail orientated
- Excellent at multi-tasking
- Exceptional organization skills
- Quick thinker, that thinks outside the box
- Very resourceful and quick to respond to email and phone calls
- Extensive travel experience

VOLUNTEER AND MEMBERSHIPS

- Environmental Club Centenary College
- Member of the American Sociological Association (ASA)
- Member of the Urban Affairs Association (UAA)
- Member of the American Political Science Association (APSA)

Rosemarie Noonan

HOME ADDRESS:

5 Winslow Road
White Plains, New York 10606
914-949-3815
914-332-4144

EDUCATION: **J.D., Pace University School of Law**
1976 M.A., Government, Georgetown University
1973 B.A., magna cum laude, Political Science, Trinity College

EXPERIENCE:

1979 - Present **Housing Action Council,** Tarrytown, New York

Executive Director of regional not-for-profit organization providing organizational, planning, development, and technical services to public agencies, not-for-profit organizations, religious groups, human service organizations, and civic groups which resulted in the development of over 3000 housing units in the Hudson Valley Region. Sponsored over 500 units of affordable housing. Served as an adviser to public and private organizations on policy, program design and program implementation issues. Manages the Community Housing Resource Center which develops local constituencies for affordable housing and the New York Mortgage Coalition Program which is a consortium of 10 financial institutions dedicated to providing mortgage counseling and mortgage products for low and moderate income families and individuals. Manages the Yonkers Affordable Housing Office which was responsible for identifying and securing 600 existing housing units and facilitating the development of four new construction projects under a housing desegregation order; currently manages compliance with the order.

1979 – 1993 **N.N.G Associates, Inc.,** Tarrytown, New York

Executive Vice-President of N.N.G. Associates, Inc. a real estate consulting firm involving property acquisition, project concepts, financial modeling, market analysis, debt and equity financing, local land use processing and project development. Specialized in the development of affordable housing and assistance to the not-for-profit sector in organizational and housing development.

1978 – 1979 **NYS Division of Housing and Community Renewal**
New York, New York

Program Specialist for Office of Policy Development and Research. Participated in the design and evaluation of the Neighborhood Preservation Program.

1975 – 1978 **National Leased Housing Association**
Washington, DC

Director of National trade association of private and public housing firms involved in government assisted rental housing development. Developed policy positions, managed a membership organization, and advocated at all levels of government.

RECENT PUBLICATIONS

"Westchester Local Housing Deskbook", 2007

"A Local Leader's Guide to Meeting Housing Needs" as a contributor to a publication of the Land Use Law Center of Pace University School of Law, 2003

LOCAL AFFILIATIONS

Federal Home Loan Bank of New York Affordable Housing Advisory Council – Member since 2005

New York Mortgage Coalition – Board Member since 2003

Westchester Women's Agenda – Secretary and Board Member since 2005

GAITRE RAMBHAROSE
80 Glen Road, Yonkers, NY 10704, 914-457-9243, GR11631@aol.com

Experience:

Housing Action Council — **Office Manager/ Marketing Assistant**
Tarrytown, NY — **5/04 - Current**

- Prepare marketing materials for Fair and Affordable Rental and Ownership opportunities
- Design and place advertisements with various publications to ensure outreach to racially and ethnically diverse households
- Establish and enhance relationships with Account Managers from media sources to institute significant cost savings
- Assist in the preparation of affirmative marketing plans for existing fair and affordable housing developments
- Update database with marketing data collected through the Affirmative Marketing process
- Prepare mailing lists and email groups for various Community Contacts in Affirmative Marketing Plans for material distribution
- Provide reports summarizing the marketing activities in process
- Update database to show results of Affirmative Marketing activities
- Coordinate the translation of marketing materials into Spanish language
- Send notification letters announcing lotteries, lottery numbers and next steps in the selection process
- Respond to inquiries from potential applicants interested in affordable housing opportunities
- Discuss available affordable housing opportunities with phone and walk in clients
- Handle routine and confidential Board and Committee related tasks – includes coordinating, scheduling and attending meetings.
- Liaison between clients, consultants, board members and staff, schedule meetings.
- Research and coordinate employee benefits, maintaining personnel files.
- Implement software programs to enhance business efficiency and growth.

United Way of NYC — **Internal Audit Analyst**
New York, NY — **1/01 – 8/03**

- Prepared weekly summary analysis and reports for actual against plan for Operations.
- Monitored financial projections against receipts and identified discrepancies in data reporting from multiple sources.
- Expedited the processing of receivables to ensure timely availability.
- Served as a liaison between interrelated departments.
- Served as departmental control point for monetary donations and commitment letters for the finance department.
- Worked with various Account Representatives to assure timely collection of pledges, significantly reducing unresolved accounts.

Semi Alloys Inc. — **Administrative Assistant**
Mount Vernon, NY — **3/94 – 12/00**

- Placed and expedited a heavy volume of orders for production, equipment and office supplies via phone, fax or online.
- Prepared orders from approved documentation within designated dollar amounts.
- Ensured that database of orders and delivery information is updated.
- Requested quotes and information on product specifications from vendors.
- Resolved discrepancies with vendors and staff regarding billing, delays, replacements and incorrect shipment.
- Evaluate product specifications from new vendors and make recommendations.

Skills: Proficient in Microsoft Word, Excel, Power Point, Publisher, Outlook and WordPerfect.

Education: **Monroe College** — **New Rochelle, NY**
Bachelor's Degree in Business Management — **August 2000**
Honors: Summa Cum Laude

Kevin Thomas
2904 Morgan Dr.
Carmel, NY 10512
Phone: 845-661-3531
Email: thomas269@comcast.net

Housing Action Council, Inc. — **Office Assistant**
Tarrytown, NY — **September 2010- Present**

- Acting as office assistant to the Executive Director
- Promote available housing opportunities for purchase and rental to prospective applicants
- Assist walk-in clients with questions with reference to the submission of their application
- Heavy call volume to assist callers with their housing related questions and application requests
- Distributing and marketing current developments to local organizations countywide
- Coordinate and organize monthly First Time Home Buying Workshops
- Assisting in the recertification process and maintenance of the Yonkers Affordable Housing Program waitlist
- Completing necessary office errands and assisting with various projects to keep Housing Action Council running smoothly and efficiently.

CPBH Petroleum — **Manager**
Brewster, NY — **August 2009- July 2010**

- Maintaining indoor market/cafe and outdoor gas station
- Providing customer service for both indoor and outdoor business
- Handling over $20,000 worth of credit card, cash, and check transactions per work shift
- Repairing and maintaining computers, electronic registers, and underground pumps

Trinity Products — **Manager**
Brewster, NY — **November 2008- July 2009**

- Serving as indoor manager and representative of Trinity Products
- Managing inventory decisions and placing orders for indoor store
- Working as customer service attendant for both indoor and outdoor business
- Handling over $40,000 worth of credit card, cash, and check transactions per work shift
- Repairing and maintaining computers, electronic registers, and underground pumps

The Laundry Club **Customer Service, Maintenance**
Province, RI **July 2008- November 2008**

- Maintaining and repairing 50 plus washer/dryer machines
- Providing customer service to indoor Laundromat, waiting facility and outdoor parking lot
- Wash, dry, folding, and dry cleaning services in tasteful presentation
- Managing dry cleaning orders, organization method, and stock inventory

Amackassin Club **Maintenance**
Yonkers, NY **May 2003- August 2005**

- Overseeing tennis court maintenance of clay surfacing, across the street bar and diner food, catering, and drink service
- Applying red top clay to outdoor tennis courts, maneuvering rolling machine to smooth surface
- Assisting in interior design and catering assistant for weddings and other celebration

Education

Studied at the Institute of Audio and Research (New York, NY)

Brewster High School, Class of 2007, Regents Diploma (Brewster, NY)

GEO. ANTHONY HOELTZEL

721 WARBURTON AVENUE
YONKERS, NEW YORK 10701

HOME: 914/476.4402

OFFICE: 914/332.4144
E-MAIL: thoeltzel@affordablehomes.org

DIRECTOR, COMMUNITY HOUSING RESOURCE CENTER, TARRYTOWN, NEW YORK (2008 – present)

CHRC is a program of the Housing Action Council, Inc. in Tarrytown, NY, a not-for-profit technical consulting group advancing the development of affordable housing in the Hudson Valley Region. Through organizing advocates, producing education/information, conducting research and providing technical assistance, CHRC seeks to create a more favorable climate in local communities for the development of fair and affordable housing.

- Identify, recruit, and engage grassroots advocacy groups, municipally-appointed housing boards, and municipal officials to devise ways to advance fair and affordable housing: workplan involves 15-17 different communities at any given point in time.
- Collaborate with the Land Use Law Center at Pace University's School of Law in providing an annual 4-day intensive training in land use law and collaborative decision-making for local municipal decision-makers.
- Conduct research and outreach in a 9-county (NY/CT) region to assist Westchester County in its development of an Affirmative Fair Housing Marketing Plan (AFHMP) to comply with provisions of a court-ordered fair housing Stipulation and Settlement Agreement with HUD.
- Develop Affirmative Fair Housing Marketing Plans affirmatively furthering fair and affordable housing developments in several Westchester communities in compliance with the Stipulation and Settlement Agreement.
- Provide consultation services to the New York & Connecticut Sustainable Communities consortium, headed by the Regional Plan Association, to identify key contacts in communities of color and other underrepresented population for three projects in Westchester County.
- Coordinate "Homes for Westchester", a collaboration of 22 member agencies and organizations addressing the obstacles to fair and affordable housing in Westchester County.

EXECUTIVE DIRECTOR: THE SHARING COMMUNITY, INC., YONKERS, NEW YORK (1988 – 2008)

The Sharing Community, Inc. is a church–sponsored, but separately incorporated, non-sectarian minority-controlled, community--based organization, the largest direct service and advocacy organization for the urban poor of Yonkers, NY (the fourth-largest city in the state). Operating budget: $7.3 million. 127 employees. (See *www.thesharingcommunity.org.)*

- Positioned, structured, and led organization in growth from three programs into a diversified 'continuum of care' with eighteen operating programs, including the development, construction, and management of 120+ new units of transitional and permanent affordable housing for homeless individuals.
- Broadened funding base to include federal, state, and corporate grants while increasing congregational and private support. Implemented accounting and data collection systems and controls for multiple source contract administration.
- Increased representation of minorities and women on Board of Directors and in senior management and administrative positions. Led administrative reconfiguration.

- Led organization in designation by the New York State Department of Health AIDS Institute as the regional "MSA" (multiple services agency) to coordinate HIV services and identify unmet HIV-related needs in communities of color of southern Westchester.
- Organized lobbying and public pressure efforts to impact administrative regulations and public policies affecting the homeless, hungry, HIV+, and urban poor on county and state levels.
- Participated in leadership of organizations with similar concerns/missions as The Sharing Community.
- Participated in local, county, and statewide panels and conferences as presenter.

PROGRAM COORDINATOR: THE SHARING COMMUNITY, INC., YONKERS, NEW YORK (1985—88)

Administrator responsible for two of organization's three component programs.

- Designed and implemented program to engage over 400 volunteers each month — largely through religious and community groups — in The Sharing Community's Soup Kitchen.
- Conceived, designed, advocated for, and generated funding for countywide food distribution program — FoodP.A.T.C.H. (People Allied to Combat Hunger) – now the Food Bank for Westchester, the only single-county food bank in New York State outside New York City, serving over 140 emergency feeding programs and currently delivering in excess of two tons of surplus food each week.
- Led county coalition of emergency food providers from loosely–organized support group to incorporated and funded lobbying and advocacy group.

PRIEST: HOLY CROSS CHURCH, YONKERS, NY (1995—)

Part-time parish ministry in small, minority-majority congregation in southwest Yonkers. Responsible for worship, preaching, teaching and pastoral care.

PRIEST ASSOCIATE: ST. JOHN'S CHURCH, GETTY SQUARE, YONKERS, NY (1985— 1995)

Part–time parochial ministry on multi–clergy staff in urban parish. Emphasis on preaching, adult education and community ministry.

RECTOR: ALL SAINTS' CHURCH, HARRISON, NY (1976—85)

Parish ministry in suburban setting. 230 members. Emphasis on adult religious education, stewardship, building renovation, pastoral care, community ministry, and congregational development.

- Developed program and site for satellite day care center and food pantry program using parish buildings.
- Organized successful political campaign to unseat 14–year incumbent for seat on school board.
- Created campus ministry at the only state university for the arts (SUNY, Purchase).
- Led campaign to renovate and restore historic 19th century church building: interior, structural, stained glass.
- Provided leadership to and representation of parish in community organizations.

ASSISTANT RECTOR: GRACE EPISCOPAL CHURCH, NYACK, NY (1975—76)

Parochial ministry in parish of 650 members, with primary responsibilities for youth work and community ministries.

CURATE: ST. BARTHOLOMEW'S CHURCH, WHITE PLAINS, NY (1973—75)

Parochial ministry in parish of 550 members. Shared ministry but with primary responsibility for youth work and community ministry.

EDUCATION: The General Theological Seminary, New York, NY. M.Div.
Concentration: Systematic Theology

The University of South Alabama, Mobile, AL. B.A.
Major: Philosophy. Minors: Political Science, History.

AFFILIATIONS: *Trustee, Harrison Central School District; Harrison, NY*
Member, Episcopal Peace Fellowship;
Member, Fellowship of Reconciliation;
Member, Board of Directors, C.L.U.S.T.E.R. (Congregations Linked in Urban Strategy to Effect Renewal);
Chair, Westchester "Housing Now!";
Founder, Food-P.A.T.C.H. (People Allied to Combat Hunger) – foodbank;
Member, Board of Directors, CHOW (Coalition for the Homeless of Westchester);
1st Vice-President, Community Planning Council of Yonkers;
Member, Budget Committee, Episcopal Diocese of New York
Member, Board of Directors, Planned Parenthood of Westchester–Rockland;
Chair, Religious Advisory Committee;
Member, Yonkers Branch, NAACP;
Founder, Yonkers HIV/AIDS Providers Task Force;
Member, Board of Directors, Leviticus 35:32 Alternative Fund;
Trustee, Yonkers General Hospital;
Trustee, St. John's Riverside Hospital;
Vice-Chair, Performance Improvement Committee, St. John's Riverside Hospital;
Member, Chaplaincy Development Committee, St. John's Riverside Hospital;
Member, Institutional Review Board, St. John's Riverside Hospital;
Vice-President, Westhab in Yonkers, Inc.

Theresa I. Fleischman
12 Piping Rock Drive
Ossining, New York 10562
(914)762-8890

EXPERIENCE

October 1995 to Present — Housing Action Council, Inc.
Tarrytown, New York
Director of Housing Counseling Program and Housing Counselor

- Manage the home buyer counseling program.
- Counsel up to 300 households and assist 50 – 75 households a year to purchase a single family, multi-family, condominiums or cooperative homes.
- Organize, advertise and conduct first time home buying seminars.
- Develop curriculum and utilize available training material to conduct homebuyer workshops and seminars in order to educate consumers on the process of purchasing a home through the open market or a fair and affordable housing opportunity.
- Tailor educational material for fair and affordable housing opportunities and for employer based training opportunities.
- Promote fair and affordable housing opportunities through various marketing efforts including radio, cable television, direct mailings, email blasts, social media, flyer distribution, notification to an extensive list of network of non-profit organizations, community based organizations, faith based groups, municipalities, unions and businesses. Both more traditional and more technology based marketing methods are used to reach a broad spectrum of qualified households.
- Conduct one-on-one counseling sessions which includes budget and credit counseling with first time homebuyers with an emphasis on household in the low and moderate income range.
- Work with potential purchaser's overtime to get households ready for homeownership.
- Educate homebuyers on mortgage products, including FHA, SONYMA, lender conventional products and any down payment or closing cost assistance that maybe available.
- Utilize and manage CounselorMax, a data collection and report system.
- Coordinate with municipalities to assist households to purchase utilizing the Housing Choice Voucher Program (throughout Westchester and Rockland County).
- Qualify household for funding through HOME, NYSAHC, Yonkers Affordable Housing Program and coordinate with City, County, State and Federal agencies.
- Advocate on behalf of purchasers with lenders as they go through the mortgage process.
- Qualify households for fair and affordable rental opportunities.

June 1986 to June 1995 — General Motors Acceptance Corporation
Yonkers, New York
Credit Supervisor

- Supervised 15 credit representatives and clerks.
- Investigated and made credit determinations on retail and lease applications.
- Analyzed and maintained controls over dealership operations. Reported financial performance in relation to overall capitalization and profitability.

- Conducted dealerships field audits and made recommendations based upon results.
- Monitored daily collection activities via reports, database, and potential loss files. Developed and implemented corrective action if needed.
- Directed handling of over 30,000 accounts while maintaining a high level of customer satisfaction.
- Administered Quality of Work Life Survey to all employees. Conducted meetings based upon results and acted as liaison between management and staff.

Special Assignment

- Participated in task force located in Long Island and Detroit with GM Legal Department in a litigation involving an out-of-trust condition in excess of $450 million.

Credit Representative

- Supervised and controlled outstanding retail and lease customer credit accounts.
- Developed alternative financial programs and strategies for customers unable to meet contractual obligations.
- Handled the disposal of repossessed collateral.
- Developed and monitored subordinate collection staff and clerks.

PC Coordinator

- Implemented programs to streamline operations.
- Maintained all branch hardware and software.
- Trained employees on computer database operations.

PROFESSIONAL TRAINING

Web based – CounselorMax, Windows, Word, Excel, Word Perfect, Hudson Gateway Multiple Listing Service and regularly participate in SONYMA, Fannie Mae, HUD and other training opportunities offered by industry professionals.

EDUCATION
May 1986

SUNY Albany - Bachelor of Arts
Sociology/Computer Science

REFERENCES

Furnished upon request.

Ms. Frengiz Surty
55 South Broadway
Tarrytown, NY 10591
914-332-4144
Fsurty@affordablehomes.org

Education

1992-94	Yale University, School of Management MBA - Concentration in Public and Private Finance, and Marketing Honors: Recipient, Kaiser Foundation Award
1985-89	University of California at Los Angeles BA, *cum laude*, Economics and Business

Not for Profit Industry

2008 – Present

Housing Action Council, Inc., Tarrytown, New York
A non-profit housing counseling agency
Director, Foreclosure Prevention Counseling; Counselor, Affordable Homeownership & Rental

AFFORDABLE HOMEOWNERSHIP & RENTAL COUNSELING

- Provide credit & budget counseling to prepare low- and moderate-income households for rental and homeownership opportunities.
- Educate & advise clients on mortgage products, grants and affordable developments available to first-time homebuyers.

FORECLOUSRE PREVENTION COUNSELING

- Conduct interviews with homeowners in distress, and analyze their financial situation to determine home retention or other options. Act as homeowners' partner throughout the loan modification process.
- Negotiate loan modification & forbearance agreements with banks and bank attorneys.
- Advocate for clients in front of court-appointed referees at NYS Supreme Court in the Foreclosure Settlement Conference Part.

Housing Counseling Certification & Training: Foreclosure Intervention & Default Counseling; Developing & Implementing an Effective Foreclosure Program-NeighborWorks Center for Homeownership Education & Counseling (NCHEC), Lending Basics for H.O. Counselors (NCHEC), SONYMA Products-NYS Coalition for Excellence in H.O. Education, FHA Loan Products (NCHEC).

MARKETING & OUTREACH

- Create & disseminate educational information through expert interviews and announcements on cable TV, radio, print media and the internet (including Facebook, Twitter, community website postings, and email network "blasts").
- Coordinate community outreach workshops and events to: (1) educate struggling homeowners on the loan modification process, available programs, and requirements, and (2) educate low- and moderate-income clients on the process of obtaining an affordable rental property and/or buying a home that suits their budget.
- Participate in task force groups to keep abreast of issues relating to new housing laws. Meet regularly with political representatives and other advocacy groups to share successes and discuss problem areas.
- Participate in community-sponsored outreach events, including cultural fairs, housing fairs, and other fairs sponsored by organizations in the non-profit & private sectors.

Fashion Industry

1998-2008 Urbana Handbags, New York, NY
Wholesale designer handbag business
Founder, President & Creative Director

- Market Urbana brand products worldwide to upscale specialty stores throughout the US, Canada and Japan.
- Direct design team and oversee product design and development. Coordinate all aspects of sourcing and factory production.
- Expanded business in year 3 by launching a private label division to accommodate growing retailer demand for customized products.
- Act as a consultant to apparel and accessory start-up companies.

1996-97 Chetta B. New York, NY
Sourcing Manager, Women's Bridge Apparel

- Analyzed sales projections and worked with sales force to forecast upcoming season orders.
- Planned production schedule with head of production department.
- Negotiated and sourced all piece goods.

1995-96 Joan Vass, New York, NY
Vice President of Operations, Ready to Wear Division

- Increased market share by attracting new accounts with lucrative in-store shop deals.
- Supervised accounting and sales staff.
- Pursued creative growth opportunities including licensing deals.
- Advised the designer in the areas of clothing and fashion show production.

Finance Industry

1994-95 Dillon, Read & Co., Inc. New York, NY
Associate, Public Finance Investment Banking

- Created financial models & reports focusing on municipal clients' debt condition & bond deal options.
- Wrote request for proposals (RFPs) for major city agencies (MTA, HHC) consideration.
- Managed and coordinated the company's annual report content including the municipal department's deal stories; worked closely with directors.

1989-92 Cambridge Associates Boston, Massachusetts
A financial consulting firm catering to non-profit, endowed institutions
Consulting Associate

- Counseled foundations and colleges on financial planning. Analyzed fund managers of interest, created asset allocation models, and analyzed foreign currency rates.
- Created dynamic financial forecasting models for clients' in-house decision making.
- Created and conducted new associate training programs.

Community Service

2004-2010 The Northern Westchester Shelter, Inc. (NWS) Pleasantville, New York
A non-profit organization that provides housing, counseling and legal services to victims of domestic violence
Board Member June 2005-2010
Volunteer 2004-5

As Board Treasurer:

- Provide advice on financial and strategic planning issues.
- Participate in fundraising.
- Worked closely with the CFO as a volunteer, and now more in depth as Treasurer.

As Board Vice President:

- Conceived of and facilitated a pro-bono partnership between the NWS and a prominent law firm to strengthen the NWS legal services department.
- Analyzed Public Relations strategy with marketing group, and secured air time for our public service announcement on various TV and radio stations throughout Westchester and NYC.

As Shelter Liaison:

- Plan and execute a variety of programs relating to shelter residents' wellness, including traditional medical service provider connections.
- Coordinate interior refurbishment and decorating effort at shelter home.
- Assess needs with the shelter's Director regarding physical plant and equipment, and relay information to the Board.

Summer 1993 — New York City Mayor's Office of Operations
Assistant to Director

NYC-UNICEF Immunization Campaign:

- Liaison with private sector, community based organizations and other city agencies. Coordinated pilot programs and participated in project to immunize 100,000 infants and toddlers, and link their families to primary health care.

Homeless shelter system review:

- Visited and surveyed the condition and status of NYC's homeless shelters. Assisted in writing reports related to findings

1989-92 — Pine Street Inn Homeless Shelter Boston, Massachusetts

- Participated in weekly volunteer activities ranging from one-on-one reading sessions to day trips for elderly, homeless women.

Lucy Verde Ortiz
63 Smith Avenue
White Plains, NY 10605
(914) 682-4993 (home)
(914) 806-6719 (cell)
Lucy.Ortiz@optonline.net

Experience

Housing Action Council — **Yonkers Affordable Housing Coordinator**
Tarrytown, NY — **2/12 to Present**

- Assist the Executive Director in the administration of the Yonkers Affordable Housing Program
- Conduct outreach to landlords, not-for-profit and community-based organizations to promote the program
- Handle all aspects of participant eligibility including, recertification, interim recertification and initial certification
- Maintain database with participant information including subsidy payment
- Responsible for landlord relations including lease negotiation and problem resolution
- Manage applicant wait list

Westchester County, Dept. of Planning — **Program Director (Housing Program Coordinator)**
White Plains, NY — **1/05 to 12/11**

- Interpreted federal regulations and formulated policy and procedure to develop and implement a monitoring program for County funded affordable housing
- Monitored approximately 100 affordable housing developments for compliance with federal, state and county funding regulations and requirements
- Conducted annual compliance monitoring based on federal regulations of all rental and homeownership units totaling approximately 3,700 units
- Interpreted federal regulations regarding Affirmative Fair Housing Marketing Plan (AFHMP) requirements and developed policy and procedure that was included in the County's Plan
- Reviewed, approved and monitored AFHMPs submitted by developers
- Provided technical assistance to developers on program compliance including AFHMP guidance
- Authorized resale and refinance of homeownership units
- Coordinated with the County Attorney's Office in handling legal issues
- Monitored the affordable housing requirements of Intermunicipal Agreements with municipalities receiving County Legacy Program funding
- Oversaw eligibility compliance of additional programs such as Community Housing Development Organization Program and the American Dream Downpayment Initiative
- Conducted public outreach including creating affordable housing project guidebooks for developers, municipalities and homeowners
- Arranged affordable housing tours and followed up with creating the Housing Alive Video
- Coordinated training and workshops for non-profit housing agencies, municipalities, developers and other entities involved in providing affordable housing

Westchester County, Dept. of Planning — **Program Director (Section 8 Program)**
White Plains, NY — **10/96 to 1/05**

- Managed the Section 8 Program with an administrative budget of $2.5 million and an additional $42 million of subsidy payments
- Interpreted and applied federal laws and regulations to the administration of the program
- Secured funding for additional vouchers which increased from 1,103 in 1996 to 2,700 in 2005
- Managed professional and support staff of over 30 people which included overseeing recertification, lease renewal, interim recertification, initial certification, data system management and Housing Quality Standards inspections
- Ensured that the program met or exceeded minimum requirements of ongoing federal audit system – Section 8 Management Assessment Program - Program rated High Performer during my tenure
- Consistently achieved high program utilization

Program Director (Section 8 Program), continued

- Supervised management of the waiting list including creating initial briefing procedures
- Updated and implemented the Administrative Plan
- Responsible for all compliance and financial reporting at federal, state and county levels
- Oversaw special programs such as Family Self Sufficiency, Homeownership and Family Unification including writing grant proposals, design and administration of programs
- Conducted intergovernmental program coordination at the federal, state and interdepartmental levels to maximize delivery of services to customers
- Coordinator of the Westchester County Section 8 Local Administrators Network receiving HUD award in recognition of "Continuing Partnership to Provide Housing to our Communities"
- Organized regional workshops, meetings and trainings for Section 8 administrators in the lower Hudson Valley Region, New York City, Nassau and Suffolk Counties
- New York State Department of Housing and Community Renewal Section 8 Taskforce member

Westchester County, Dept. of Planning — **Program Specialist (Section 8 Program)**
White Plains, NY — **9/95 to 10/96**

- Assisted in administration of the Program
- Supervised and trained staff assistants
- Conducted case file review to ensure program compliance
- Monitored staff input of tenant data and landlord payment for monthly transmission
- Responsible for landlord relations including lease negotiation and problem resolution
- Extensive contact with community organizations, clients, landlords and County departments

Westchester County, Dept. of Planning — **Staff Assistant (Section 8 Program)**
White Plains, NY — **7/93 to 9/95**

- Determined client eligibility
- Prepared leases, addendums and contracts and input data into the New York State computer system which generated landlord payments and data for transmission to HUD
- Conducted fraud investigation, prepared informal hearing materials and presented at hearings
- Performed Housing Quality Standards Inspections
- Conducted Peer Case Review

Westchester County, Dept. of Health — **Community Health Worker**
Hawthorne, NY — **12/92 to 7/93**

- Assisted in administration of the Yonkers Pulse Healthy Heart Program
- Promoted program awareness and participation through community outreach
- Developed community programs
- Coordinated and supervised health fair and special events
- Recruited, trained and supervised volunteers
- Prepared public relations materials

Education

- New York University, Graduate School of Public Administration
  Masters in Public Administration
  Awards: GPA Merritt Scholarship
- State University of New York, College at New Paltz
  Bachelor of Arts Degree – Major Art History
  Study Abroad: Summer Program - Studied Art History in Italy
  Honors: Cum Laude

Languages

Italian and Spanish

Attachment 2

Scope of Services: Marketing Consultant

The below scope of work worksheet is based upon the ***Westchester County Affirmative Fair Housing Marketing Plan*** ("County AFHMP") and the ***Housing Development Affirmative Fair Housing Marketing Plan Requirements*** (the "Plan Requirements"). For complete listing of responsibilities, both documents are located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(i) and G-1(ii); and attached to this RFP as Exhibit 1 and Exhibit 2. All proposals must fully comply with the Plan Requirements and County AFHMP.

The scope of work worksheet includes, but is not limited to, the activities necessary to develop and implement affirmative fair housing marketing plans (the "Plan(s)") specific to individual housing developments.

Scope of Work

Work Item	Item Cost
A. Preparation of the Plan(s)	
1. Undertake steps to coordinate and centralize marketing for all affordable AFFH units and other units covered by the Plan Requirements.	
2. Develop a "template" for the Plans by development size for County approval. • 1 – 4 unit development • 5 – 29 unit development • 30 – 49 unit development • 50 or more unit development	 $ 2500 Plan $ 2500 Plan $ 2500 Plan $ 2500 Plan
3. The templates must be provided to the County in MS Word or in such form as may be requested by the County. 4. The templates must include, but not be limited to: • The process to define the local market area ("LMA") which shall encompass a population of between 5,000 to 50,000, depending upon population density; or comprise a 1-2 mile radius surrounding a housing development site; list the census tracts within the LMA, and identify the racial/ethnic characteristics of the LMA population using relevant 2010 U.S. Census data obtained from http://www.census.gov or http://www.westchestergov.com/planning/research/default.htm. • The form of notice to the County, and others, of intent to begin marketing to be used at appropriate point in time for each development.	

- Provide for affirmative marketing to the income groups as expressed in terms of the County's Area Median Income ("AMI"), at or below 80% AMI for homeownership developments and at or below 50% and 60% AMI for rental developments.
- Outline special efforts to reach and engage those in the marketing and outreach area, described in Part V of the Plan Requirements (See Exhibit 2 of this RFP), who are least likely to apply ("LLA") and ensuring outreach to racially and ethnically diverse households reaching all potentially eligible households.
- Templates for Advertisements ("Ads"), Press Releases and Public Service Announcements ("PSA") to be used for each type of development including homeownership and rental developments, or grouped developments if multiple developments or properties are available about the same time. All advertising for all units will be consistent with the Fair Housing Advertising Regulations at 24 CFR 109 and Fair Housing Act Regulations at 24 CFR 100.75. State expected number of each template to be produced.
- Contact list and model PSA to be run on each municipal cable station in the LMA and in the entire marketing and outreach area (9 County area including Westchester, Putnam, Rockland and Fairfax Counties, and all five boroughs in New York City) for each type of development undergoing marketing.
- Templates for Ads, Press Release or PSA for placement on web-based media sites, and state expected number of each template to be produced
- Templates of marketing brochures, fliers or other material and of application forms in both English and Spanish. All must be produced in electronic PDF format so that they may be posted on websites and provided electronically to the County and others. State expected number of each template to be produced
- Provision for development of marketing materials in Spanish language, and alternative resources to address other language needs, such as opening an account with a "Language Line" or alternative provider that provides 24/7 translators which can be accessed as needed by marketing staff to assist in serving all other limited English proficient ("LEP") persons.
- Provide that all print materials produced will include the Equal Housing Opportunity ("EHO") logo and, where applicable, the International Accessibility logo.
- A plan to coordinate advertising for developments and properties so as to reduce overall costs which also takes into consideration the media outlets and data analysis regarding the readership/audiences of media outlets within the marketing and

outreach area, and advertise in a manner that most effectively reaches the least likely to apply ("LLA") population. NOTE: Ad frequency and placement will be part of each development budget, and is not included as cost item in this scope of services.

- For developments of 1 – 4 units, the template must provide whether the there will be use of commercial media, and if there will be no use of any commercial media, the template plan should indicate the reasons for not using such media.
- Activities to seek opportunities for radio and television coverage (via interviews, press releases, and news coverage) including those serving LLA populations, as frequently as possible beginning on the date of initial marketing period; and that any press releases prepared should also be sent to all television and radio outlets.
- Provide steps to be undertaken by the marketing consultant to request community contacts and other outlets to distribute information through their social networks and use of Facebook and Twitter Pages; and also evaluation of use of social media to allow for updating over time, as new forms of social media emerge and gain mainstream membership.
- Steps to be undertaken to conduct outreach to all persons who have signed up on Westchester County's Centralized Intake System. The County will provide a contact list electronically upon request for those who have signed up for rental housing or those who have signed up for homeownership.
- A description of how the marketing consultant will:
  - Conduct or participate in at least two information workshops in locations with concentrations of LLA populations within the Marketing and Outreach Area which will be reasonably accessible to public transportation
  - Offer to provide in-person presentations to employees and union members of local businesses.
- The process to consult with municipal leadership and community contacts to conduct outreach to local civic organizations, neighborhood associations, faith-based organizations, and other groups to describe the housing, the value of diversity, and to encourage community members to welcome applicants and new residents of the housing, and encourage "open house" sessions welcoming the new residents.
- Ensure that all marketing materials to be provided to the applicants are also provided to the County for review prior to use with applicants; and that all marketing materials be provided to the County in electronic format.

• The steps and criteria for monitoring and evaluation of the outcome of marketing, including media, community contacts and other outreach efforts. • The steps and criteria for collection and retention of data relating to race and ethnicity, household composition, and source of referrals from applications, inquiries or attendance at informational meetings. • Steps to assure marketing for any subsequent sale or leases of housing units in accordance with the County requirements, including marketing of the property. • All other items identified in the Plan Requirements. For complete listing of responsibilities are located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(ii).	
B. Implementation of the Plan(s)	
1. Work with Developers to draft a Plan for each development; Developers will be required to work with the successful proposer: The marketing consultant will have the primary responsibility to produce the Plan; and it must specify the roles and responsibilities of the developer and others – such as marketing agent and/or property manager – involved in marketing the development, accepting and reviewing applications, and selection of eligible applicants Submit each development specific Plan to the County for review and approval: • 1 – 4 unit development • 5 – 29 unit development • 30 – 49 unit development • 50 or more unit development	$ 2,500 /Plan $ 15,000 /Plan $ 25,000 /Plan $ 35,000 /Plan
2. Implementation actions to be taken by the marketing consultant for each development must include, but not be limited to: • Timely submission of all required documents to the County • Issue a Press Release announcing that the housing units are available to the entire marketing and outreach area (using the template(s) provided). • Issue Press Releases and PSAs to appropriate outlets as identified in the Plan, including those serving the LLA population for each development or group of developments or properties.	

- Coordination of advertisements for all developments so as to reduce overall costs. NOTE: Ad frequency and placement will be part of each development budget, and is not included as cost item in this scope of services.
- Coordinate requests and placement of PSAs on each municipal cable station in the entire marketing and outreach area for developments of five (5) units or larger.
- Seek opportunities for media coverage, including Web-based media coverage including those that serve LLA populations, through interviews and available news coverage for the housing developments.
- Produce print and electronic brochures, fliers or other marketing material and application forms for each development in both English and Spanish. NOTE: Actual production of these marketing and application materials is specific to each development will be part of that development's budget, and is not included as cost item in this scope of services.
- Electronic Marketing brochures, fliers or other material and application forms in both English and Spanish must be produced in electronic PDF format so that they may be posted on websites and provided electronically to the County and others.
- Provision for alternative resources to address other language needs, such as opening an account with a "Language Line" or alternative provider that provides 24/7 translators which can be accessed as needed by marketing staff to assist in serving all other LEP persons.
- Request an electronic download of the contact information of all who have signed up on the County's Central Intake list two-weeks prior to initiation of the marketing period; and notify all on that list of the availability of the housing units and direct them to sources for additional information. NOTE: The specific outreach activities will be part of each development budget, and is not included as cost item in this scope of services.
- Document contact and follow-up with community contacts engaged in the outreach through such sources as call logs and email correspondence.
- Conduct or participate in at least two information workshops in locations with concentrations of LLA populations within the Marketing and Outreach Area, which are reasonably accessible to public transportation.
- Conduct outreach to local civic organizations, neighborhood associations, faith-based organizations and other groups in

consultation with municipal leaders and community contacts to encourage community members to welcome applicants and new residents of the housing; and to describe the housing and the value of diversity. • Encourage community groups to hold open house sessions for prospective residents. • Collect data on a monthly basis (including from the developer, the developer's marketing agent, or staff, as appropriate) that will be used to assess the effectiveness of the marketing efforts. The data analysis will be evaluated as described in the approved Plan for each development, and will be in accordance with HUD's Handbook 8025.1, Chapter 2. • Adjust or increase outreach activities and advertising as advised by the County based on the monthly report showing effectiveness of marketing efforts. • Provide for required training of marketing consultant's staff, as appropriate including, without limitation, as required by Federal, New York State and Local Fair Housing Laws, prior to the initiation of the marketing period for any housing development, and document that such training has been provided to all participants in the marketing of the development, including the Developer, Marketing Agents or other staff, including Property Management staff, as appropriate. • Any other items identified in the Plan Requirements. For complete listing of responsibilities are located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(ii).	
C. Monitoring of Plan(s)	
1. Prepare and submit reports, in such form as may be requested by the County including: • A monthly report to the County summarizing marketing activities for that month (include) documentation of compliance with County requirements and federal, state and local fair housing laws • Quarterly reports to the County summarizing the data from the monthly reports for that period • A report for each development upon completion of the initial marketing for the development	$ 7,350 / Year $ 750 / Quarter $ 500 / Development

2. The reports must include, but are not limited to:
   - Number of inquiries and applications for each development
   - Disposition of the applications, including the number accepted for processing; the number rejected, with reason for rejections; or other disposition status and action including selection for occupancy.
   - Data on race and ethnicity, household composition and source of referral from applications or inquiries; referrals from community groups; and information provided by attendees at informational meetings for each development
   - Data on race and ethnicity, household composition of those households selected for the housing, and have occupied their unit.
   - Such information should be provided to the County electronically in an excel file, in a format and content as approved by the County.
   - Any other items, as identified in the Plan located on the County's website at http://homes.westchestergov.com/housingsettlement in Appendix G-1(ii).

3. The County will review and monitor the reports and marketing data collected pursuant to Part VIII of the Plan Requirements (see Exhibit 2 of this RFP) which may result in the County directing an increase in marketing efforts, or re- evaluate outreach efforts in accordance with Part V of the County AFHMP (See Exhibit 1 of this RFP).
4. It should be noted that any reporting required pursuant to Section C will include aggregation of reports as the County may request.

D. Services to Homeowners of 1-4 Owner-Occupied Units

1. Upon completion of the initial marketing and occupancy of any owner occupied properties, the marketing consultant will be authorized, and must undertake re-marketing and income eligibility of the subsequent residents, in accordance with the County's requirements of the below types of properties. Such work includes, but is not limited to:
   - Identification and selection of a new homebuyer of all owner-occupied units, where the initial or subsequent owner is selling or transferring their property;
   - Identification and selection of a new homebuyer of all owner-occupied 1 – 4 family properties; and
   - Identification and selection of new tenants in all owner-occupied 1 – 4 family properties, where the initial or subsequent owner has a vacancy and is offering rental units for lease.

2. The charge for providing this service to the property owners will not exceed the maximum identified by type of property, including any escalation fee beyond 2012:	
• Resale of a individual homeownership unit	$ 5,000 /Unit
• Resale of a 2 – 4 family home	$ 5,000 / 2-4 Unit Property
• Identification of a tenants for one (1) rental unit in a owner occupied 2 – 4 family home	$ 1,000 / Rental Unit
• Annual Escalation Fee after 2012 (percent increase/year)	2 % per Year

The below listed work scope items are all items that the County must conduct as part of the ***Westchester County Affirmative Fair Housing Marketing Plan*** ("County AFHMP"), but may be provided under an agreement with the marketing consultant, at the County's discretion.

E. Optional Work Items (County AFHMP)	Item Cost
1. Conduct ***Housing Alive*** bus tours of affordable housing developments (estimated 5 tours, 1 in each of 5 regions)	$ -- / Tour
2. Update ***Housing Alive*** video (view the video at: _____)	$ -- / Update Video
3. Draft PSA & Press Releases for County (estimated ___ PSA or Press Release)	$ -- / PSA or Press Release
4. Work with community informational resources including libraries, churches community agencies, municipalities and non-profit agencies, including those which deal with the disabled community, seniors and minority groups who are LLA to help disseminate information to the public	$ 7,500 / Annually
5. If requested, ensure that all County marketing materials include Spanish language materials, and access a language line to serve other LEP populations	$ -- /
6. Provide marketing material to faith based and community organizations the serve newly arrived immigrants	$ 3,000 / Annually
7. Provide marketing material to adult-education training centers or ESL cases, as requested	$ 1,500 / Annually
8. Encourage voluntary affirmative marketing agreements between local real estate industry trade associations and HUD-certified housing counseling agencies, including provisions for reduced fees and advice to potential customers about available AFFH units	$ -- / Annually