



February 22nd, 2023

Proposal for Homeless Housing Placement Process Improvement

NYC Housing Development Corporation



The information contained in our response constitutes proprietary trade secrets or confidential commercial and financial information of BCG. Accordingly, pursuant to applicable laws and regulations, and based upon the exemptions from disclosure provided by the federal Freedom of Information Act and the exemptions provided under the Freedom of Information Law (FOIL), we hereby request that the NYC Housing Development Corporation afford confidential treatment to the information in this proposal. If any person should request an opportunity to inspect, copy or otherwise obtain disclosure or use of any part of such information, we request that we be immediately notified of any such request, be furnished with a copy of all written materials pertaining to such request (including but not limited to the request itself and any agency determinations with respect to such request), and be given advance notice of any intended release or disclosure. Further, regardless of any requirements to the contrary, BCG reserves the right to request modifications to standard contract terms prior to execution of any agreement pursuant to this proposal.

Proposal – Table of Contents

1	Letter of Interest.....	4
2	Project Understanding and Approach	6
2.1	Project Understanding.....	6
2.2	Project Approach	7
3	Team Description	8
3.1	Our partnership: BCG and Rios Partners.....	8
3.2	Our team.....	8
3.3	Senior Leadership team	9
3.4	Working Team Managers	11
3.5	Working Team Consultants.....	13
3.6	Expert Advisors	15
4	Case Studies	17
4.1	Case study: City of Los Angeles, Inside Safe Program	17
4.2	Case study: New York City, Mayor’s Office of Efficiency (MOE) stand-up	18
4.3	Case study: Transportation agency in a large metro, maintenance process improvement.....	18
5	Proposed Workplan	20
5.1	Overview of Workplan.....	20
	20
6	Proposed Budget	23
7	Additional forms.....	24
7.1	BCG’s standard terms and conditions (engagement letter/contract).....	24
7.2	Equal Employment	24
7.3	Minority and Women Owned	24
7.4	New York City Location.....	24
7.5	Local Law 34 Compliance.....	25

Mapping of Information requested in this RFP to sections in the response

INFORMATION REQUESTED IN RFP	RESPONSE OR SECTION TO REFERENCE IN THIS DOCUMENT
Table of Contents	Page 2
Letter of Interest on the consultant team’s interest in the project and the team’s availability	Page 4-5
Project Understanding and Approach: A statement of no more than two pages demonstrating your understanding of the project and explaining your approach	Page 6-7
Team Description: a list of the key team members and their experience. Please provide information on relevant and similar projects that the team has completed. Also, share information on any sub-consultants you plan to use.	Page 8-16
Example case(s): work products from similar projects to help evaluate your proposal	Page 17-19
Proposed project plan with a roadmap of sub-deliverables and client review cadence	Page 20-22
Engagement Letter/ Contract	Provided as attachment
Proposed budget with a detailed breakdown	Page 23
Submission of information requested in the Appendix of this document	Page 24-25 and provided as attachment

1 Letter of Interest

February 22nd, 2023

Alex Merchant
New York City Housing Development Corporation
110 William Street
New York, NY 10038
Email Address: amerchant@nychdc.com

Dear Mr. Merchant:

Boston Consulting Group, Inc. ("BCG") is pleased to submit this response to the New York City Housing Development Corporation ("HDC") and the New York City Department of Housing Preservation and Development ("HPD") Request for Proposals (RFP) on homeless housing placement process improvement on behalf of BCG and our team members Rios Partners.

NYC residents are currently facing the highest rates of homelessness since the 1930s, meaning that the mission of the HDC and HPD – to preserve and develop affordable housing for low- to moderate- income New Yorkers – has never been more important. As the need for more homeless placements has increased, this has put additional pressure on housing organizations and led to more complexity across the system as a whole. We believe we are the right team to help improve process efficiency for the following reasons:

We know New York City. Although we operate globally, our largest office is in New York, with over 1,000 staff. We have a long track record of supporting New York City agencies, businesses, and residents, and are committed to helping New York succeed. In the last year we have worked for NYC agencies such as NYCHA, DOHMH, the Mayor's Office of Efficiency and the MTA. Our team has a deep understanding of policies and priorities in New York at both the City and State level, and we are fully aligned with NYC's priority to design policy and implementation through a holistic and equitable lens, ensuring that a diverse set of stakeholder's and client's voices are represented.

We have deep operational and process improvement expertise. We have a tried-and-true playbook for process optimization. In the last two years, we have completed 3,000+ projects globally on process improvement, with 300+ of those for public sector projects. These cases range from helping the federal government reduce time waste for flight training to supporting helping human services accelerate benefits enrollment. Across all these cases, we have integrated closely with client teams, focusing on human-centered design. This includes conducting in-depth customer and stakeholder interviews to produce more holistic customer journey maps.

We have experience helping other jurisdictions with homeless placements. In the last year we have supported homelessness programs in multiple geographies, including San Francisco, Los Angeles, Seattle, and Rhode Island, including the expansion and improvement of various aspects of their housing

policies and processes. We are currently supporting the City of Los Angeles to scale the Inside Safe program of temporary placements. We can bring you the expertise & best practices from these and other similar jurisdictions that can only come from on-the-ground experience.

We know equitable stakeholder inclusion is fundamental to the success of this work. We believe that bringing the most affected stakeholders to the table yields the most effective solutions in every situation. This includes continually improving our information gathering process to ensure accurate representation from stakeholders and clients alike, carefully integrating the insights we gain from our interviews into our final recommendations. We bring this ethos to our own team as well, which includes experts from Rios Partners, a veteran-owned MBE with experience in supporting many state and local government agencies in the Northeast. We have a record of successful collaboration with Rios on multiple projects in New York.

We would be incredibly excited to partner with HDC and HPD to improve such a critical process that serves as a lifeline for thousands of New Yorkers in need. As a firm, we pride ourselves on our social impact work which focuses on leaving a positive imprint the world. We can think of no better way to showcase that than here, in New York City, applying our expertise to our fellow neighbors in need.

Our response, contained in the following pages, further details the experiences and insights we will bring to this effort. We look forward to the opportunity to engage with you and further discuss how we can support you.

Sincerely,



Scott St Marie
Managing Director and Partner, BCG



Dan Helmer
Director, Rios Partners

2 Project Understanding and Approach

2.1 Project Understanding

Homelessness and access to affordable housing have been ongoing challenges for New York for decades and have only intensified over the last five years. Alongside the increase in housing stress, and in many ways because of it, those trying to navigate the housing system face increased complexity and confusion navigating the system itself, leading to greater uncertainty, longer wait times, and less accessibility to the wrap-around services they desperately need. Today, well over 50,000 New Yorkers are without housing on any given day, whether in shelters or living on the streets. This is a high priority for the Adams administration to address, and we are already seeing some notable reforms and pilot programs put into place to address it, such as the “Street to Housing” pilot launched this week. The HDC and HPD are also working tirelessly to address this crisis and facilitate faster and easier placement of unhoused NYC residents into permanent living situations. Our goal would be to come alongside these two organizations and partner with them to identify ways to improve & streamline today’s process to provide even greater impact for unhoused NYC residents.

The complexity of the placement process creates barriers for the New Yorkers seeking placement along with costs to government. These processes deserve a closer look to both to improve the experience for unhoused NYC residents as well as simplify administrative needs, reduce processing time, and decrease per placement costs.

The processes that underly placements are in some ways necessarily complex given the need to orchestrate multiple stakeholders (shelters, permanent housing providers, government agencies, etc.), serve an array of clients (tenants, caseworkers, building marketing agents, etc.) and integrate multiple programs and funding streams. Information sharing and data management must serve these various needs in a secure but streamlined way. The circumstances and needs of unhoused individuals vary dramatically and the processes must be built to support everyone.

Key to finding adequate solutions is to incorporate as many relevant voices as possible at each point along the way, and approach proposed improvements with the understanding that the situation surrounding each unhoused individual and household is unique, meaning our recommendations need to be multifaceted and diverse.

Given our experience on this topic in multiple geographies that face a similar volume, complexity, and urgency (e.g., San Francisco, Los Angeles, Seattle, and Rhode Island), we have a keen understanding of the nuances of the challenge and some of the best practices available to bring real progress to NYC.

2.2 Project Approach

We have an approach to system improvement that is based off time-tested, off-the-shelf tools which we then customize for each client, tailoring the timing and activities based on the processes in scope and the number of stakeholders involved. This allows us to move faster and with greater certainty, delivering top-quality results efficiently.

Our approach to reviewing and improving processes has three parts:

1. *Diagnosis*: We start by conducting a baseline and opportunity assessment, typically through in-depth interviews with a diverse set of stakeholders, surveys, and data analysis, focusing on specific issues that are linked directly to the performance problems identified—for instance, what administrative requirements today function as the greatest hurdles to unhoused people
2. *Solution Design*: We then develop a set of interventions that address the underlying causes of specific performance issues, and consist of carefully targeted changes that promote desired behaviors and produce a clear and measurable impact on performance. We do this both through collaboration with you (creative working sessions, user-story generation, etc.) and through a sweep of the competitive landscape and our knowledge of best-in-class processes and similar client successes, to ensure you have all possible best practices to leverage – for instance, how other housing departments have structured their user journeys to minimize the timeline
3. *Implementation*: We then ensure the success of those interventions by drafting an implementation road map that includes buy-in from relevant teams and leaders, sets & tracks KPIs, and identifies key milestones. Additionally, we ensure integration between technology solutions and other enabling solutions (e.g., people solutions).

BCG has a broad set of proprietary tools across service and support operations that enable process reengineering improvements, such as:

- Smart Start allows us to identify performance issues caused by complicatedness. Through our survey of 1,000 companies to understand how complicatedness affects their operations, we found that certain industries, particularly the public sector, are more burdened by complicatedness. Government agencies face daunting levels of external complexity, greater levels of regulation, and more government control over their operations, and they seem to have mimicked that complexity within their own organizations. Smart Start allows us to uncover the complicatedness dimensions in your organization that require further analysis
- Activity Based Optimization (ABO) is our solution for value-based resource optimization. ABO enables companies to streamline processes, define clear roles, and reduce costs, by collecting and analyzing resource data on employees and costs that span across all the activities and processes in your organization. When a company has a clear picture of who is doing what, every day, it makes it possible to work smarter, be more efficient and more productive
- Non-personnel cost tool baselines standard cost buckets and compares KPIs to peers and identifies digitization opportunities
- DICE tool is a predictive analytical tool that enables forecast of potential project outcomes from “highly successful” to “highly unsuccessful.” This allows us to design projects to have the greatest likelihood of success and have robust information from which to determine potential trade-offs across initiatives

3 Team Description

3.1 Our partnership: BCG and Rios Partners

We are bringing you the optimal team and are confident that the capabilities and experiences across our three firms will deliver exceptional value to you and the residents of NYC. BCG recognizes that our M/WBE partners are critical to helping solve the real-world problems our clients face. Further, the experiences of their founders and leaders offer essential perspectives to the challenges of equity. For this project, we will include **Rios Partners**, one of our M/WBE partners.

Rios Partners is a Service-Disabled Veteran Owned Small Business (SDVOSB) formed in 2016 that serves public, non-profit, and private sector clients. Rios brings functional expertise in strategy, leadership, human capital, organizational design, and human-centered design. BCG and Rios Partners have successfully collaborated on projects for dozens of public sector organizations, including the Veterans Administration and the Department of Commerce. To this engagement, Rios Partners brings expertise in stakeholder engagement with particular specialty in large complex public sector organizations and ecosystems.

3.2 Our team

We have brought together the best possible team for this project. Below are the individuals who will be working with you if the project starts on a timeline aligned to the RFP.

Our working team is structured as follows:

Overall project manager, either **Vikas Anand** or **Tiffany Fan** depending on timing of the project and NYC HDC preference, will be 100% dedicated to this project. Vikas has multiple years of process improvement experience for government agencies and aviation. Tiffany has experience leading complex projects in New York City, having led efforts to stand up the Mayor's Office of Efficiency.

Senior leadership team, Scott St Marie, Selin Zalma and Dan Helmer, are leaders across BCG and Rios Partners and will support Vikas or Tiffany throughout the project. They will help guide the overall direction of the project and prioritize efforts throughout. They are accountable for the success of this project and will be on the ground with the team approximately 50% of the time.

- **Scott St Marie:** Led teams supporting housing agencies in Los Angeles, Rhode Island and Australia. He will be the senior leader primarily responsible for executing this work
- **Selin Zalma:** Cross-functional leader who lead's BCG's state and local government work nationwide and is the point person for our New York City relationship
- **Dan Helmer:** Brings 20 years of experience in public sector strategy including working closely with state and local governments to define operational goals and develop policies to achieve those goals

Consultants, such as Rachel Krust, Jordan Ashmore and Eric Plunkett, will collect data, conduct analyses, identify benchmarks, and best practices and develop recommendations need to deliver this project. These bios are provided as representative examples pending confirmation of project start date. We have a deep pool of more than 1,000 local staff upon whom to draw, so we will ensure that the best possible team is deployed at the start of this project.

Experts will be available to share relevant best practices from other jurisdictions and guide the team. They include:

- **Suchi Sastri:** a Managing Director at BCG who has lead the development of homelessness strategies for the City of San Francisco and Challenge Seattle
- **Jorge Fanjul:** a Director at the Centre for Public Impact who leads work on stakeholder engagement for government organizations. He was previously a Senior Advisor for Democracy NYC

Support from partners and internal BCG teams will be leveraged as necessary to meet the demands of the project but will include additional research, design and writing support

3.3 Senior Leadership team



Scott St Marie

Managing Director and Partner



Education

MBA, Stanford School of Business

BA, Columbia University

Profile summary

- Scott is Managing Director and Partner with 10+ years of public sector consulting experience, including work on housing and homelessness in Los Angeles, Rhode Island, and Australia
- He is a core member of BCG’s team serving New York City and New York State and has led multiple projects with both the City and the State.

Relevant project experience

- Developed homelessness and housing supply action plan for a state government in New England
- Launched the first government-backed COVID digital health credential
- Conducted a whole-of-government efficiency review for the State of Connecticut. Project identified \$900m+ of efficiencies and recommended changes to both internal operations and resident services
- Led a UK government department's program to create a new international border with the European Union following Brexit, including defining new import/export processes for 300 commodities
- Created a new economic diplomacy team for a Middle Eastern government, including designing the function, running recruitment and hiring processes, and developing analytical tools and processes
- Designed a new customer journey for an Australian disability services agency, leading human-centered design to improve citizen centricity, financial sustainability, and health/social outcomes

Prior experience

- Prior to BCG, Scott worked in healthcare technology and policy in California

- He has an MBA and Certificate in Public Management from the Stanford Graduate School of Business, where he was also a fellow at the d.school (Hasso Plattner Institute of Design), and a BA in Economics from Columbia



Selin Zalma

Managing Director and Partner



Education

MBA, Columbia Business School
BA, Brown University

Profile summary

- Selin Zalma is a Partner and Managing Director based in BCG’s New York office. She leads BCG’s Northeast Public Sector practice.
- Selin has worked with multiple government agencies, non-profit organizations and private companies serving public agencies. Her core focus is on delivering operational enhancements and complex large-scale transformations for her clients. In addition to her work with Public Sector organizations, she leads BCG’s relationship with Save the Children US and UN Women.

Relevant project experience

- Led and supported NY State's COVID response in multiple areas including Vaccine Program design and roll out, PPE supply and warehousing strategy and procurement, COVID Analytics
- Working closely with the Mayor's Office and New York City Office of Emergency built and launched the GetFood program that delivered 200M meals to vulnerable New Yorkers at the height of COVID
- Developed transformation agenda for the State of Connecticut focused on service continuity & improvements while lowering costs; spanned 40+ agencies and resulted in 200+ opportunities worth \$600-900m (see CREATES)
- Worked with U.S. State to develop transparency around cost and priorities across agencies in a collaborative manner, and created central portfolio management capability
- Led holistic assessment of a U.S. State agency, developed future strategic vision, ambition and organization – informed by client agency needs, external benchmarking and analytical KPI assessment
- Designed governance approach and key roles and responsibilities for an international non-profit organization with programs in 50+ countries
- Private sector: Led 10+ large scale transformations in consumer goods / retail / food and infrastructure space. Played central role in setting agenda, coordination and integration across stakeholders, development of roadmaps and change management.

Prior experience

- Prior to BCG, she worked as a management consultant at Inductis



Dan Helmer

Director

Profile summary

- Dan Helmer is a Director at Rios Partners and brings more than 20 years of experience in strategy, program management, operations, supply chain management, and environmental policy
- He brings extensive team leadership experience in the public and private sector and is an Iraq and Afghanistan Veteran and Rhodes Scholar

Relevant project experience

- Led efforts to develop programs with the US Department of Veterans Affairs to establish resiliency within its national medical supply chain, helped scale



Education

MA, University of Oxford
 BA, United States Military Academy

national clinical trials, and develop procurement processes to drive value in the Department’s supply chain

- In the Commonwealth of Virginia, he has worked closely with state and local government to define environmental goals and develop policies to achieve those goals to address soil and water pollution as well as climate change.
- US Department of Agriculture – Food and Nutrition Service, Northeast Regional Office: Led effort to implement leadership training for senior managers to drive improved performance at a large branch of USDA’s Food and Nutrition Service
- Department of Veterans Affairs: Led a team supporting VHA’s overall supply chain transformation efforts, to include overseeing efforts to launch and manage multiple strategic sourcing initiatives, stand up a new governance structure, and effectively respond to supply chain needs during the COVID-19 pandemic.
- Department of Veterans Affairs: Stood up a new Logistics Operations Center to oversee centralized inventory and distribution management efforts, to include an enterprise customer service organization. Oversaw the design of a series of dashboards and business intelligence tools to provide the center with real-time information on COVID-19 efforts.
- Private Aerospace Manufacturing Company: Led a team that supported the organizational transformation of an aerospace and defense firm that was undergoing a period of rapid growth.

Prior experience

- Prior to his work in government, Dan was recognized as a Rhodes Scholar and leader in the US Army supporting management of large-scale supply chain programs and commanding an element within the Special Operations Command
- Rios Partners LLC – Director, Operations Practice Leader 2018 – Present
- The Boston Consulting Group – Project Leader 2014 – 2017
- United States Army – Officer 2003 – 2014

3.4 Working Team Managers



Vikas Anand
 Principal



Education

Profile summary

- Vikas is a Principal who has been with the firm for five years, with much of his work focused on the Travel & Tourism and Public Sector practice areas
- In these areas, Vikas has deep experience serving clients across a range of commercial and operational topics and has led several large-scale programs both in the US and internationally

Relevant project experience

- Developed data remediation strategy for digital COVID vaccine credential for large US state
 - Diagnosed and responded to over 200,000 citizen reported issues with digital credential

MBA, Kellogg School of Management
 BA, Columbia University

- Led efforts to share records with neighboring states to ensure complete public health record
- Worked with providers to improve vx data quality to better improve credential performance
- Led BCG's Racial Equity Task Force to make progress against racial equity goals within the firm
 - Worked with stakeholders across BCG to advance racial equity within BCG (hiring/retention), with our clients (DEI strategy, products), and with the broader world (nonprofits, donations)
- Identified COVID cost-out at major North American network carrier to reach breakeven point
 - Unearthed and evaluated over \$300M in cost savings from various operational groups
 - Sized potential and tradeoffs for each opportunity; developed implementation plans Outlined major shifts in skills required and strategies to fill gaps for Board of Directors Prior experience

Prior experience

- Prior to joining BCG, Vikas worked at JetBlue Airways in New York as Manager of Revenue Management. He also worked at the Mahindra Group in Mumbai as part of a two-year program in the group's corporate strategy team.



Tiffany Fan
 Project Leader



Education

MBA, Wharton School, University of Pennsylvania
 MPP, Harvard Kennedy School of Government
 BA, Yale University

Profile summary

- Tiffany is a Project Leader with substantial experience working with state and local clients, including work on customer-experience program design and operating model transformation in New York State and New York City.
- She is an active member of BCG's state and local practice area, where she has led multiple projects for Pennsylvania, New York State, and New York City.

Relevant project experience

- Managed 20+ agencies preparing to set policy agendas for New York State, including supporting research and benchmarking on housing supply regulations and demand-side interventions
- Supported the business transformation of a unit managing energy use across all NYC buildings
- Conducted diagnostic of existing process inefficiencies and under-met needs of the city's agency partners
- Redesigned staff workflow to enable greater customer centricity and designed roadmap to upgrade technological capabilities to support
- Stood up a new office dedicated to improving customer experience for the City of New York
- Facilitated strategic discussions to solidify office's vision and mission
- Designed roles and responsibilities for staff and conducted trainings on resident-focused program design
- Developed COVID testing strategy for state of Pennsylvania, including surge response strategy during peak caseload situations and step-down strategy in steady state

Prior experience

- Outside of BCG, Tiffany also has experience in the nonprofit space, having worked as a Program Manager for the Bloomberg Mayor’s Challenge, supporting cities in using human-centered design principles to solve their most pressing challenges
- Tiffany holds an MBA from the Wharton School, an MPP from the Harvard Kennedy School and Certificate in Public Management from the Stanford Graduate School of Business, where he was also a fellow at the d.school (Hasso Plattner Institute of Design), and a BA in Economics from Columbia

3.5 Working Team Consultants



Rachel Krust

Consultant



Education

MPP, Harvard Kennedy School

BA, University of Sydney

LL.B, University of Sydney

Profile summary

- Rachel is a consultant who joined BCG Sydney as an Associate in 2017 and transferred to the North American system after graduating with a master’s in public policy from Harvard Kennedy School in May 2022. Since joining BCG in 2017, Rachel has worked on strategy, procurement, op model and implementation, predominantly for public sector clients, across a range of policy domains, including housing, health, and education.

Relevant project experience

- Advised large federal department on transformational service delivery reform program; built rigorous pricing model, supported economic modelling for business case and cabinet submissions and developed options for commercial model underpinning market partnership
- Led development of “case for change” underpinning 10-year strategy for state health department; consulted with senior stakeholders, modelled budgetary scenarios
- Led development of procurement strategy for (different) state health department; built model in Alteryx identifying clients and products to target, consulted with internal procurement experts and senior stakeholders to develop negotiations strategy
- Supported New York State to develop flagship 2023 housing compact, including supporting with strategic framing, data analysis and communication
- Supported State of Rhode Island to develop short-term homelessness action plan through stakeholder consultation, data analysis and strategic framing of options
- Led workforce development strategy for small Indigenous organization on ‘Jawun’ secondment

Prior experience

During her undergraduate degree, Rachel worked at a leading Australian law firm. While at Harvard Kennedy School, she led research projects for Harvard Project on Workforce, a Senior Fellow on social determinants of health, a large behavioural health provider in New York and an Australian foundation focussed on innovative citizen engagement.



Profile summary

Jordan Ashmore

Associate



Education

BA, Columbia University

- Jordan is an associate at BCG. She has worked in media, as well as education, employment, and welfare (EEW).

Relevant project experience

- Supported the New York regional team of an education non-profit in reimagining and redesigning their alumni strategy, leading the effort to analyze current teacher staff survey data.
- Helped redefine the organization design and operating model for a global analytics company, supported effort to clean and run analysis on existing client data.

Prior experience

- Prior to BCG, Jordan interned in Hong Kong at a global news organization. She also worked as an economics research assistant.



Eric Plunkett

Senior Consultant



Education

MEM, Yale School of the Environment

MBA, Yale School of Management

BA, Yale University

Profile summary

- Eric Plunkett is a clean energy advocate, policy analyst, and project manager
- He has extensive experience consulting for federal, state, and nonprofit clients in the areas of environmental policy analysis, clean energy implementation, and human-centered design (HCD).

Relevant project experience

State energy offices – Alabama, Colorado, Delaware, Missouri, New Hampshire

- Developed comprehensive energy code compliance strategies for five U.S. state energy office clients in response to federal policy mandates
- Produced educational tools and marketing materials that increased buy-in among a wide range of stakeholders and reduced barriers to compliance for builders and inspectors

Global Green Growth Institute

- Led research, writing, editing, and visual design of reports on financial innovation and solar deployment in emerging markets

Environmental Defense Fund – Climate Corps Fellow

- Created energy reduction plan for 75,000 ft2 office building and campus with projected \$480k savings over ten years

Economic Development Administration (EDA) – The Department of Commerce

- Managed three teams that performed 2,600+ application reviews for EDA grant competitions that awarded \$1.1 billion to organizations building regional innovation ecosystems
- Co-developed a scenario modeling tool for EDA to assess applicants using key indicators, such as rural counties, coal communities, and EDA regions, to ensure grantee diversity and impact

Prior experience

- Before working at Rios, Eric had several Energy specialist roles at Habitat for Humanity, Alliance to Save Energy, Environmental Defense Fund, Sparkfund, Motiv Strategies, and Global Green Growth Institute

3.6 Expert Advisors



Suchi Sastr

Managing Director and Partner



Education

MBA, Stanford School of Business
BS, University of Pennsylvania

Relevant project experience

- Developed a community housing strategy for a nonprofit organization, including designing a framework, identifying solutions, and creating an investment strategy for the housing plan
- Provided support in governance related project for a non-profit organization, including supporting the client in key strategy discussions, as well as benchmarking them against other organizations to understand their board meeting structures and logistics
- Facilitated custom interviews for an upcoming not-for-profit leadership conference sponsored by a not-for-profit charitable organization

Prior experience

- She served as interim COO at Amour Vert, an eco-friendly apparel company with distribution in both owned and wholesale channels, where she oversaw operations including distribution and packaging. She was also Category Manager at Caribou Coffee where she oversaw new product development, sourcing, distribution and marketing for the tea and iced coffee businesses and a Product Manager at Amazon



Jorge Fanjul

Director



Education

MPM, Georgetown University
BA, Stony Brook University

Profile summary

- Jorge leads CPI’s Government Legitimacy portfolio in North America, where the team works to envision a world where the relationship between the public and government is restored

Relevant project experience

- Led the development of strategic partnerships and programs to enable CPI’s newest programmatic pillar, Government Legitimacy, to achieve its mission of reimagining democratic government so that it works better for all people through increasing community trust in government and its leaders; working with partners ranging from philanthropies and democracy funders to grassroots organizations, public sector elected officials and national thought leaders; serving as the primary national spokesperson and thought leader for CPI’s Government Legitimacy portfolio.
- Led the development of an operating plan and infrastructure to bring Government Legitimacy from concept to creation, utilizing government innovation techniques used by start-ups, and designing new programs and initiatives, including a marquee national initiative: Earned Legitimacy.
- Lead facilitator on workshops and webinars with residents and government staff including the Atlantic’s Re:think podcast, and good government organizations: Engaging Local Government Leaders (ELGL), and the National Association for County Community and Economic Development (NACCED) on government’s role in building strong relationships with communities.
- Contributor to an online workshop for public servants and policy makers through Apolitical, on the link between Climate Change and Equity ([link](#))

Prior experience

- Prior to joining CPI, he served in several roles in New York City government including the Mayor's Office where he also held leadership roles in the creation of several citywide civic engagement initiatives. He holds degrees from Georgetown University, Stony Brook University, and the City University of New York.

4 Case Studies

BCG has had a front-row seat supporting thousands of the world's most complex programs. Below are three case studies which demonstrate capabilities directly relevant to this program. Specifically, these case studies demonstrate:

- City of Los Angeles, Inside Safe Program - process optimization for homeless placements in another large city
- New York City, Mayors Office of Efficiency - complex multi-agency optimization in New York City
- Transportation agency in a large metro, maintenance process improvement - process improvement at scale for a critical government service

4.1 Case study: City of Los Angeles, Inside Safe Program

Context: BCG helped develop a plan to scale Los Angeles' processes for placing people experiencing homelessness in temporary housing

Los Angeles began implementation of the Inside Safe initiative in December, a city-wide and proactive housing-first program focused on moving individuals indoors from tents and encampments. This program is designed to create a pathway to permanent housing so that all Angelenos are housed, healthy and safe. It intends to build on work to date across the City and Service providers (e.g., Project RoomKey, Project HomeKey). The Inside Safe team designing a scalable model which will take the program from its initial pilot sites to serve thousands of Angelenos. BCG was engaged to help design and clarify the challenges associated with complex service delivery across multiple government agencies, partners, and sites.

Approach: Mapped the process and identified rate limiters

BCG mapped the current processes for placing people living in encampments into temporary housing and then permanent housing. This effort drew on existing data and interviews across service providers, City and County government and advocates. We build an operational and financial model based on initial data from pilot sites and articulated a range of program design options to accelerate the process for placements, including analysis of associated trade-offs. We worked in parallel to develop options and recommendations for both immediate improvements (i.e., the next 100 placements) and long-term changes needed to ensure that the processes were efficient and scalable (i.e., the next 1000 placements).

Impacts: program currently scaling to multiple sites and thousands of people

- Developed recommendations for process and program design to improve efficiency and allow for more placements in the immediate-term (weeks) and longer-term (months)
- Developed initial cost estimates for program at scale, including costs by agency/jurisdiction and options to manage costs
- Articulated program design options needed to expand program from current sites to additional locations, including those with significantly higher acuity

4.2 Case study: New York City, Mayor's Office of Efficiency (MOE) stand-up

Context: BCG helped support the setup of a new city agency

The NYC Mayor's Office of Efficiency (MOE) was established in April 2022 as an agency dedicated to improving performance of NYC services and customer experience. At the time of the engagement, NYC MOE had just been established by Executive Order of the Mayor and a leader, the Chief Efficiency Officer identified. As part of its setup, it needed to define a clear vision and operating model, determine an approach to working with other city agencies, design and onboard its staff of full-time employees, and launch its first wave of productivity initiatives. BCG was brought on to help develop a strategic mission and vision, supporting the setup of the office to achieve these goals.

Approach: Structured and defined the organization according to MOE input and best practices

We supported MOE to:

- Structure their office goals based on best practices across innovation offices in other cities
- Define and refine MOE's mission and vision by conducting strategy workshops
- Develop a process and supporting templates to enable staff to support Chief Performance Officers sitting within agencies in making customer experience-related improvements
- Structure review and calibration of initial cycle of CPO plans
- Define high-level action plans and determine staffing needs for cross-agency initiatives driven by MOE
- Optimize organizational structure based on activities and conduct trainings to upskill MOE staff

Impacts: Expanded cross agency initiatives, improved public communications via transparency and workshops

Since BCG's engagement, the NYC Mayor's Office of Efficiency has begun improving customer experience across NYC agencies:

- Launched ~200 efficiency initiatives across 61 agencies
- Began driving 7 cross-agency initiatives to support the Mayor's strategic priorities
- At the same time, MOE is creating a culture of efficiency and customer centricity that is unprecedented in local government settings:
- Held monthly workshops to educate agency Chief Performance Officers on key efficiency principles
- Prepared several public announcements by the Chief Efficiency Officer to promote transparency around the work

4.3 Case study: Transportation agency in a large metro, maintenance process improvement

Context: BCG helped a major metropolitan transportation agency return to budget

Our client is a large transportation organization that transports roughly 4 million passengers daily. They operate in both transit and commuter rail across one of the largest metropolitan areas in the United States. Due to COVID-19 and an increase in remote work, ridership decreased by 40%. This was a significant issue, as service levels have remained stagnant, leading to a multi-billion-dollar budget deficit.

BCG was hired to conduct an assessment to identify opportunities to improve service and productivity while improving cost efficiency in the MTA's maintenance departments.

Approach: Gathered data on existing processes and compared to transportation peers

BCG analyzed the existing process by studying current operations and service databases, as well as conducting a deep dive into spend across all major categories, such as asset optimization and operational effectiveness. To do this, we visited worksites, observed trains while running, interviewed key client employees, and fielded surveys to develop a nuanced and on-the-ground view of floor shop operations. Our process involved hosting roundtable discussions with both client leadership and their frontline workers, along with deploying surveys and collecting observations to gather more data. We also reviewed the client benchmarks against international and domestic peers.

Impacts: Improved savings opportunities, while continuing to find more opportunities to cut inefficient resource use

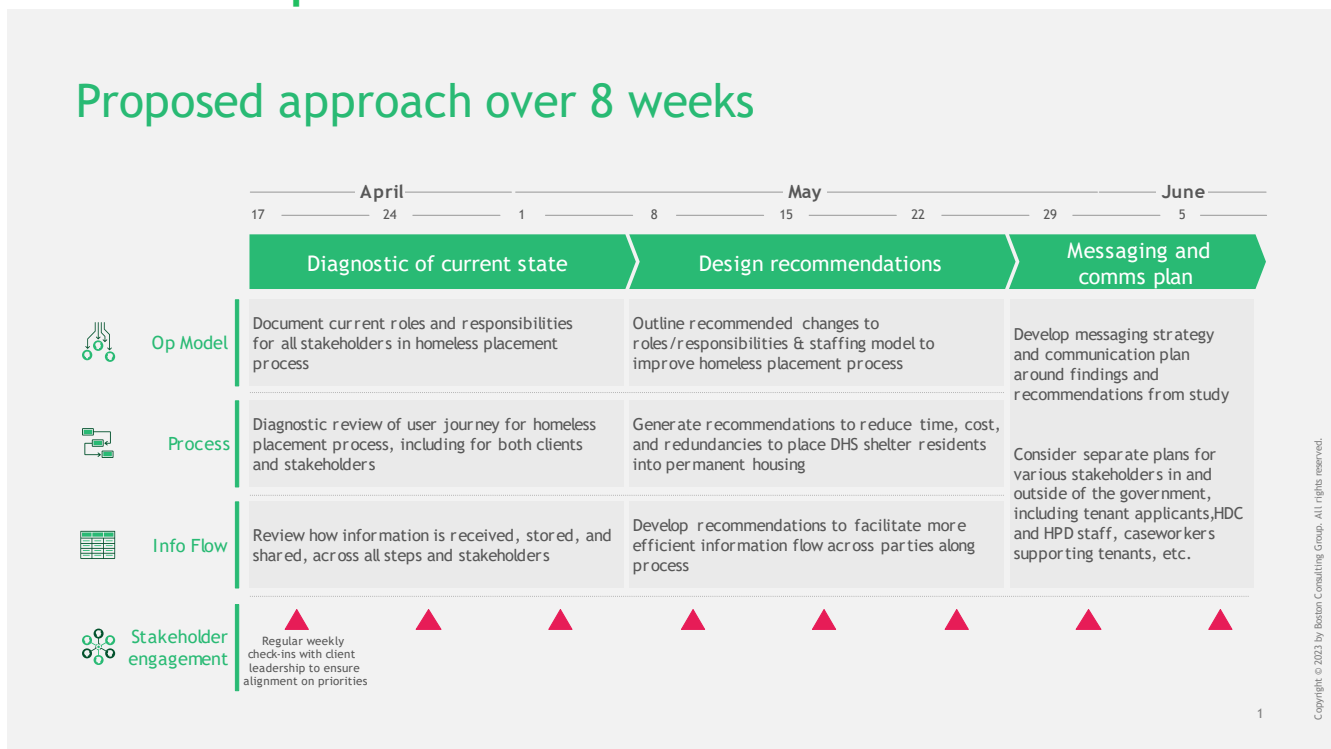
- Identified significant savings opportunities across the maintenance and operations department, amounting to ~10% of the addressable spend base
- Developing specific recommendations to address productivity initiatives
- Designing holistic fare collection strategy, as well as pilot programs for the initiatives outlined
- Developing procurement diagnostics, as well as re-designing supplier strategy

5 Proposed Workplan

5.1 Overview of Workplan

Our detailed approach to the project is outlined below. All the objectives HDC seeks to prioritize can be accomplished in eight weeks with sufficient resourcing and by running workstreams in parallel

Detailed workplan



Throughout the project, we plan to have regular, weekly touchpoints with the HDC team to share early findings and align on priorities going forward.

Workstream 1: Process

Goal: Review and recommend improvements to the process required to place someone from DHS shelters to a permanent housing situation.

Deliverables:

- Journey map of homeless placement process detailing the journey from shelter to permanent housing, with perspectives for various key actors (i.e., applicants, caseworkers, building marketing agents, etc.), including how information flows between steps

- Identification of gaps and redundancies in process that create unintended barriers for homeless households and additional administrative burdens for clients
- Summary of recommendations in process flow, steps, and timeline to improve the client experience and increase efficiency
- Include changes as part of messaging strategy & communications plan

Key Activities:

- Review existing draft process flow analysis with statistical data as available to quickly ramp up understanding process
- Supplement existing material with stakeholder interviews with staff, clients, caseworkers, subsidy providers, government agencies, and advocacy groups on process from their perspective, and gather potential recommendations for improving the process
- Evaluate homeless placement processes in other jurisdictions and previous BCG experiences to develop best practices that are applicable to NYC
- Design recommendations for process changes with estimated potential impact on time and other resources saved

Workstream 2: Op Model

Goal: Review and recommend improvements to the organizational setup within HDC and partners relevant to the homeless placement process.

Deliverables:

- Baseline of current operating model, with key organizations and their responsibilities, tasks, and jurisdictions noted
- Identification of gaps and redundancies in the operating model that create administrative burdens
- Summary of recommendations to changes in roles, responsibilities, and staffing model to improve the homeless placement process, with a focus on client experience and efficiency
- Include changes as part of messaging strategy & communications plan

Key Activities:

- Review HDC materials and conduct interviews with staff to develop baseline understanding of operating model and potential gaps & redundancies
- Evaluate operating models for placement programs in other jurisdictions and from previous BCG experience and draw out best practices relevant for NYC
- Design recommendations for operating model changes with impact on time and resources required for placement process

Workstream 3: Information Flow

Goal: Review current flow of information in the placement process, including type of information, format, method of sharing, and audience; recommend changes to the information flow to streamline placement process and safeguard sensitive client data

Deliverables:

- Detailed report of current information flow throughout placement process, including what information is received, how it is stored, what format is used (i.e., spreadsheets, paper logs, etc.), how it is shared, and intended recipient of data at various points in the process
- Identification of gaps in information flow process as well as methods to cut down on data sharing or duplicative data entry where possible
- Summary of recommendations regarding information flow to improve homeless placement process and safeguard sensitive data
- Include changes as part of messaging strategy & communications plan

Key activities:

- Review existing documentation on information sharing and conduct interviews with relevant stakeholders to develop baseline of what, when, how, and to whom information is shared to facilitate a placement
- Evaluate info flow setup in other jurisdictions and BCG experiences, drawing out best practices that are relevant for NYC
- Design recommendations for changes to information flow with impact on processing time, resources, and safety of data

6 Proposed Budget

The proposed flat fixed fee for this project is **\$250,000**, which is inclusive of all costs and represents a contribution of 50% of BCG's fees (i.e., BCG will staff a team of resources equivalent to \$500k at our standard rates). BCG will contract on a firm-fixed pricing basis; we will not bill separately for any expenses to HDC including travel.

The table below has the breakdown by workstream:

Workstream	Fee
Workstream 1: Operating Model	\$100K
Workstream 2: Process	\$100K
Workstream 3: Information Flow	\$50K
Total	\$250K

7 Additional forms

7.1 BCG's standard terms and conditions (engagement letter/contract)

The engagement letter is provided as an attachment

7.2 Equal Employment

This form is provided as an attachment—there are 781 women and minorities at the New York City Office.

7.3 Minority and Women Owned

Our teaming partner for this effort is **Rios Partners**, a Service-Disabled Veteran Owned Small Business (SDVOSB) formed in 2016 that serves public, non-profit, and private sector clients. Rios brings functional expertise in strategy, leadership, human capital, organizational design, and human-centered design.

7.4 New York City Location

We are deeply embedded in New York City and will base our team out of New York City. This includes being available for an in-person meetings and working alongside NYC HDC and other stakeholders if required.

Founded in 1984, BCG's New York office is home to more than 1,000 staff members, making it our largest office worldwide. From here, we serve clients across all industries — health care, insurance, industrial goods, financial services, consumer goods, retail, and many more. Based on these connections as well as our pro bono work, we provide unique access to New York's private sector leadership. We host board meetings for clients, such as the International Rescue Committee and City Harvest. We also maintain close contact with NYC BCG alumni and host an annual NYC BCG alumni event. Outside of NYC, we host Business Roundtable with executives from America's leading companies.

Address: 10 Hudson Yards, New York, NY 10001

Telephone Number: (760) 704-9365

Fax Number: +1 212 446 2801

E-mail Address: StMarie.Scott@bcg.com

7.5 Local Law 34 Compliance

The Doing Business Data form is provided as an attachment