



New York City Housing Development Corporation (HDC)  
Homeless Housing Placements Evaluation

# New York City Housing Development Corporation (HDC) Homeless Housing Placements Evaluation

Proposal

February 22, 2023

**Provided to:**

New York City Housing Development Corporation (HDC)  
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February 22, 2023

Alex Merchant  
Director of Process Improvement for Housing Placements  
New York City Housing Development Corporation  
110 William St.  
New York, NY 10038

**Subject: Proposal for Homeless Housing Placements Evaluation**

Dear Mr. Merchant:

On behalf of Guidehouse, we are pleased to submit our Proposal for the Homeless Housing Placements Evaluation. We are excited about the opportunity to work with you and are confident you will find that our proposal offers the best approach and team.

We appreciate the opportunity to be considered for this project and are committed to your success. If you have any questions about our proposal, please contact Virginia Boyd at 512-402-3954 or me at 650-339-3601.

Sincerely,

Anaita Kasad  
Partner

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## 1. Letter of Interest

Guidehouse is pleased to submit to the New York City Housing Development Corporation (HDC) our proposal to conduct a 90-day process analysis to evaluate homeless housing placements in New York City. Guidehouse appreciates the opportunity to be considered for this important project and, if selected, will provide the City with a team of professionals that is ready to start immediately. Our team is uniquely positioned to support you for the following reasons:

### **We know New York City and have a proven track record working with NYC government.**

This project requires a team that has experience working on New York City's diverse and complex issues. Guidehouse previously assisted the New York City's Mayor's Office of Operations, along with the City's Department of Homeless Services (DHS) and Human Resources Administration (HRA), to assist in City Hall's 90-Day Review of homeless services operations and policies. Our team worked with the City to develop recommendations centered around four key elements – prevention, rehousing, street homelessness outreach and improving shelter conditions. In 2019, we supported the Department of Social Services (DSS), DHS, and HRA on their Homeless Outreach Population Estimate (HOPE), providing project management and advisory services. We also have extensive experience working with the New York City Housing Authority (NYCHA), and have been supporting them for over the last decade across nearly every department – Leased Housing, Compliance, Strategy, Law, Procurement, IT, Asset & Capital Management, and Finance – and nearly all areas of the City's housing blueprint that pertain to NYCHA. Additionally, several people on our team previously worked at HPD, giving us firsthand knowledge as City employees that provides an inherently deeper understanding of the housing landscape of NYC. *Our work across multiple levels of NYC government as well as our specific experience with homelessness in NYC ensures that we will have the context and understanding required to effectively support HDC on process analysis and improvement.*

**Guidehouse has the necessary subject matter expertise across the vast array of complex challenges associated with homelessness.** One of Guidehouse's key differentiators is that we have a dedicated Housing & Community Solutions practice group, with subject matter experts in an array of housing and homelessness policy and practice areas. Our team includes nationally recognized housing leaders—people with deep public-sector experience who have dedicated their lives to housing solutions and have worked with and inside some of the most effective housing agencies in the country. Guidehouse is currently working with state and local housing, homelessness, and human services agencies across the U.S., as well as private-sector housing developers, safety-net health systems, and housing nonprofits, helping them adapt to new challenges, design and operate complex programs, and maximize the impact of scarce resources through innovation and creativity. We have worked at all levels of government and understand a wide range of housing programs, funding sources, and structures. *Our team's experience will translate directly into exceptional insight about NYC's housing placement process and allow us to help City agencies chart a path forward.*

### **We have deep expertise in helping clients understand the experience of customers and staff.**

We have helped numerous government agencies analyze and optimize their processes to deliver better services and improve the experience of all stakeholders. We have spent significant time examining internal processes with a critical lens – from the largest public transportation authority

in the country, to a local government agency delivering meals to homebound seniors, to the leading state health insurance exchange – to help our clients develop better experiences. In addition to analyzing policies and processes, our approach to these engagements includes interviewing key stakeholders, shadowing field staff, and hearing directly from customers through surveys, focus groups, townhalls, and interviews. We have extensive experience doing this in NYC through our work with the Mayor’s Office of Efficiency (MOE) and we have already spent time understanding the experience of some of the most vulnerable New Yorkers – including homebound seniors and New Yorkers experiencing homelessness. *We believe that there is so much more we can do together to optimize agency processes and help our fellow neighbors find homes in the most diverse city in the world.*

We are excited about this opportunity and look forward to the chance to serve the people of New York City in enhancing its housing programs.

## 2. Project Understanding and Approach

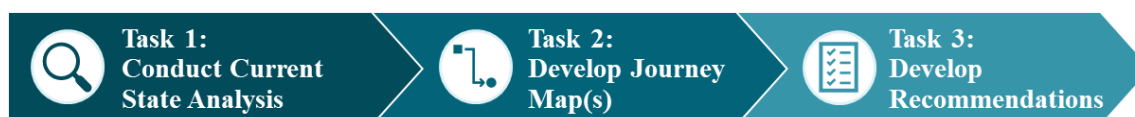
### 2.1 Our Understanding

“I want this to be a city where someone...down on their luck can get the help they need and a safe roof over their head, rather than sleeping on the street or cycling in and out of shelter.” Mayor Adams emphasized the importance of addressing New York City’s housing crisis in his administration’s blueprint for housing and homelessness, “Housing Our Neighbors.” The blueprint stresses the need for reducing the administrative burden placed on New Yorkers who must navigate complex processes that take time and energy they simply do not have. This push for reduced regulatory burdens has come down from the federal level as well, with the recent release of the final Housing Opportunity Through Modernization Act (HOTMA) rule.

The New York City Housing Development Corporation (HDC) and the Housing Preservation Department (HPD) both play significant roles in placing homeless New Yorkers in shelters into HDC- and HPD-financed and assisted housing with an HRA voucher. We understand the strain placed on agencies navigating the impacts of the COVID-19 pandemic and complex funding streams. We also understand that the individuals seeking housing placements are often faced with multiple, competing stressors, making it crucial for the City to reduce processing times and eliminate administrative burdens on the customer. As we tackle this challenge, we will combine our deep understanding of the housing landscape with broad work operationalizing government programs. Our team’s experience in NYC translates directly into a meaningful understanding of the City’s housing placement process and will allow us to help HDC and HPD move people out of shelters and into permanent housing.

### 2.2 Our Approach

We will evaluate the process of placing shelter residents into permanent housing by **analyzing the current state, creating journey maps, and developing recommendations** based on the gaps identified in the first two tasks.



#### Task 1. Conduct Current State Analysis

During this phase, Guidehouse will conduct an in-depth review of available current state documentation and data on the HPD and HDC homeless placement internal process and customer experience. Our goal is to understand the requirements of the current programs, involved stakeholders, and overlaid federal and local requirements. We will leverage any existing work that the agencies and partners have completed, including the draft process flow analysis, estimated cycle times, and any additional statistical analyses conducted by the in-house analytics team. In addition to internal documentation review, we will work with the Director of Process Improvement and the Homeless Housing Process Inter-Agency Task Force to identify applicable research methods to build our understanding of process steps and key customer touchpoints. This research may include interviews, focus groups, working sessions, surveys, in-person or call observations, and secret shopping. We will engage key internal and external stakeholders, including your team members, City agencies such as the Department of Homeless Services (DHS), community-based organizations, advocacy groups, affordable housing providers, providers of rental subsidies, applicants, caseworkers, and building marketing agents.

As we conduct our research, key findings will be captured in a tracker so we can accurately cite our sources when we move on to the journey maps.

During this task, we will collect data on the time spent and burden placed on customers, City agencies, and partners at each step of the way. We will work with you to identify the key metrics that we will analyze, such as financial requirements, time spent on waiting lists, number of vouchers allocated, and more. Guidehouse will seek to understand known inefficiencies, confusing, duplicative, or burdensome requests to customers, gaps in current outreach efforts, and current community perceptions related to time spent in transition, quality of mobility to housing units, and experience with both tenant assistance and housing placement.

***Proposed Deliverables:*** Current State Findings Report

### **Task 2. Develop Journey Maps**

Using the research and the Current State Findings Report, our team will develop journey maps to define the existing housing placement process of working through the shelter system, getting the rental assistance or voucher needed, and being placed in assisted housing. These highly detailed documents will map out the current state steps from multiple client perspectives, including tenant applicants, caseworkers supporting tenants, and building marketing agents processing applications across an end-to-end housing placement process. In addition to the sequence of steps, the journey maps will highlight the process of collecting and transferring information from one step in the process to the other, IT systems, key document and administrative requirements, and any relevant federal and local requirements.

The customer research from Task 1 will also inform challenges, areas of ambiguity, frustrations, and potential points of drop off for customers. Using objective and subjective data collected during the research phase, we will infer an estimated “time tax” imposed on customers at each phase of the process. These “pain points” and time tax indicators will be layered onto the journey map to help us identify the areas in the overall journey that have the most impact on the customer experience. For example, duplicative document requirements, unclear processing times, similar interactions with multiple NYC agencies, limited non-English language support, and paper-based processes are all potential barriers that may increase the time tax for clients. Any challenges surfaced from the current state analysis will be clearly mapped out to help the Task Force and other key stakeholders visualize the opportunities to streamline the process.

***Proposed Deliverables:*** Journey Map(s)

### **Task 3. Develop Recommendations**

Finally, we will consolidate our findings to identify key gaps and opportunities in the housing placement process. The Guidehouse team will develop recommendations specifically designed to enhance business processes and eliminate the roadblocks. These recommendations may touch on shortening or eliminating required documentation, increasing data sharing across partner agencies, updating internal processes or staff training, or building out non-English language support, for example. Our recommendations will include considerations on needed changes in program design and operations, technology, processing, staffing models, and regulations at the federal, state, and city levels while still meeting the objectives of the program, as well as considerations to inform a messaging strategy and communications plan. The final report will identify areas to reduce redundancies, eliminate unnecessary documentation, increase efficiency, and improve customer experience.

***Proposed Deliverable:*** Recommendations Report



### 3. Team Description

#### 3.1 About Guidehouse

Guidehouse has roots in supporting federal, state, and local government agencies for over 100 years. Our leadership has its foundation in PricewaterhouseCoopers’ (PwC) Public Sector practice, and in 2018 we became Guidehouse, a firm of over 16,000 professionals in over 50 offices worldwide and the largest management consulting firm equally dedicated to serving the needs of government. We are proud of our track record of successful service to government agencies across the U.S. and our reputation for delivering exceptional results and building client trust. With our recent acquisitions of Navigant Consulting in 2019 and Grant Thornton’s Public Sector practice in 2022, we have expanded our breadth of resources to be able to leverage expertise in new capabilities in our client services. The high-level quality of our client services is strengthened by the diversity of experience represented among our ever-growing staff.

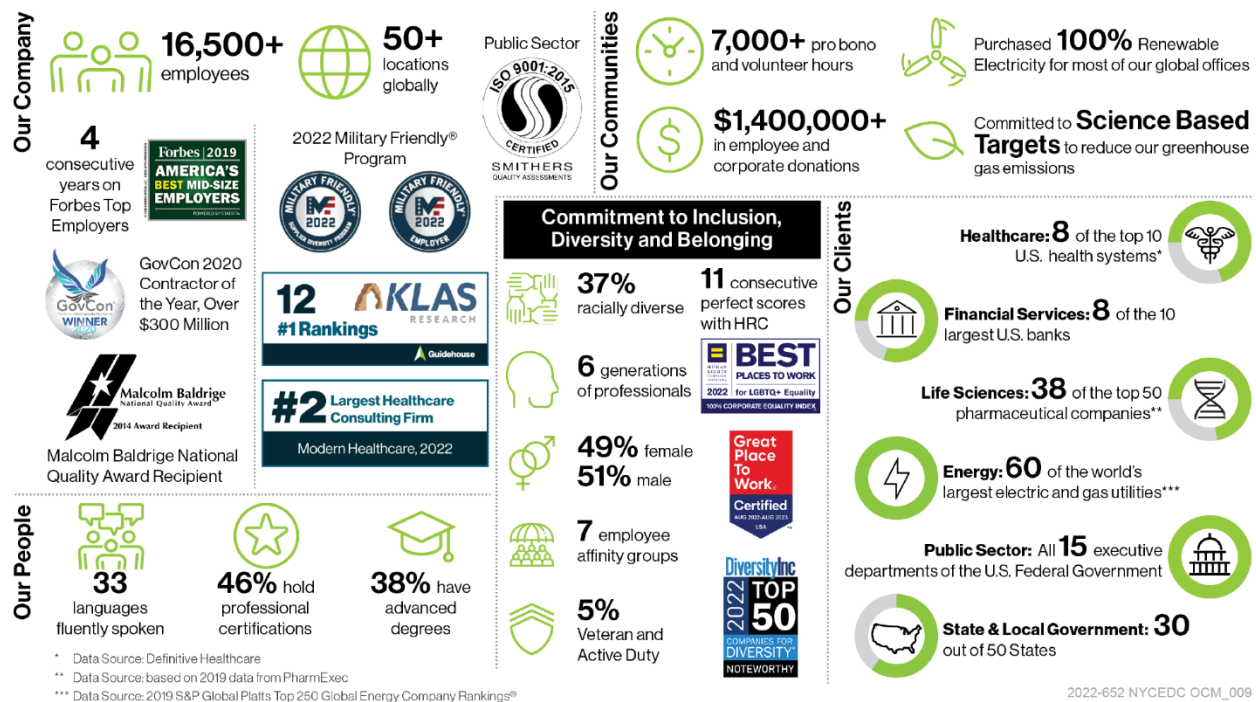


Figure 1. Guidehouse At-A-Glance

#### About Guidehouse’s State and Local Government Practice

Guidehouse is a leader in helping cities and states execute change. Our State and Local Government practice focuses on bringing top-tier talent and the integrity of our brand to cities and states to solve their most pressing problems. We work with state and local governments to connect citizens, plan and drive investments, and increase efficiency to promote long-term economic, environmental, social, and cultural prosperity. From leading statewide organizational transformations to developing smart city strategies and roadmaps, we intentionally seek out opportunities to work with governments to address issues that are core to their future success. Our State and Local Government Practice embodies the qualities needed to aid the growth and mission of NYC HDC, with market-leading strategy, economic development analyses, and sustainability expertise among our core team of consultants. Our Guidehouse State and Local Government team has extensive experience supporting NYC agencies.

<b>Highlights of Guidehouse’s New York City Experience</b>	
<ul style="list-style-type: none"> <li>• NYC Administration for Children’s Services</li> <li>• NYC Department for the Aging</li> <li>• NYC Department of Citywide Administration Services</li> <li>• NYC Department of City Planning</li> <li>• NYC Department of Environmental Protection</li> <li>• NYC Department of Buildings</li> <li>• NYC Department of Corrections</li> <li>• NYC Public Schools</li> <li>• NYC Department of Finance</li> <li>• NYC Department of Health and Mental Hygiene</li> <li>• NYC Department of Probation</li> <li>• NYC Department of Transportation</li> <li>• NYC Department of Parks and Recreation</li> <li>• NYC Department of Social Services</li> <li>• NYC Department of Veterans’ Services</li> <li>• NYC Department of Youth and Community Development</li> </ul>	<ul style="list-style-type: none"> <li>• NYC Health and Hospitals</li> <li>• NYC Department of Housing Preservation and Development</li> <li>• NYC Department of Small Business Services</li> <li>• NYC Mayor’s Office of Food Policy</li> <li>• NYC Mayor’s Office of Immigrant Affairs</li> <li>• NYC Housing Authority</li> <li>• NYC Mayor’s Office of Opportunity</li> <li>• NYC Office of Administrative Trials and Hearings</li> <li>• NYC Mayor’s Office of Minority/Women-Owned Business</li> <li>• NYC Mayor’s Office of the Chief Technology Officer</li> <li>• NYC Mayor’s Office of Management and Budget</li> <li>• NYC Mayor’s Office of Operations</li> <li>• NYC Mayor’s Office of Efficiency</li> <li>• NYC Taxi and Limousine Commission</li> <li>• NYC Economic Development Corporation</li> </ul>

### About Guidehouse’s Housing and Community Solutions (HCS) Team

Guidehouse integrates its housing and community development team dynamically across its public and commercial segments to deliver best-in-class expertise to serve a range of clients and engagement types accounting for shifting social, economic, and environmental trends. Our Housing and Community Solutions team has deep expertise working with public-sector clients, such as housing authorities, housing finance agencies, and federal, state and local housing and homeless services departments. Our team includes numerous former public officials and housing subject-matter experts. Guidehouse has significant experience working in affordable housing, homelessness, and housing instability, in a variety of contexts. Our work includes strategy, program design and implementation, grants management, technology solutions, housing data and geospatial analysis, and knowledge and experience in an array of funding programs (e.g., CDBG, HOME, HTF, Section 8, LIHTC, FHA multifamily, ESG) and agencies (e.g., HPD).

Our clients span the spectrum of organizations that intersect with housing and homelessness.



**Figure 2. Housing and Community Solutions Experience**

NYC HDC needs a collaboration with an entity that intimately understands the organization in a way that goes beyond defined work products and recognizes the challenges placed on agencies

seeking to serve the most vulnerable populations while navigating complex programmatic requirements. Guidehouse is prepared to be this partner as we work closely together to achieve NYC HDC's mission of making significant advancements in housing homeless New Yorkers. Guidehouse – and our State and Local Government Practice and Housing and Community Solutions Team – are committed to facing the challenges in creating solutions to dramatically reduce the time it takes to place DHS shelter residents into permanent housing.

In supporting NYC HDC, we are delighted to partner with Karp Strategies, a NYC-based, equity-driven leader in community and stakeholder engagement to bring a well-rounded solution tuned for your needs:



**Karp Strategies** (<https://www.karpstrategies.com/>) is an equity-driven WBE/DBE/SBE-certified urban strategy consultancy that has become the go-to firm for community-economic development planning, community and stakeholder engagement, and real estate

and urban planning strategy, design, and implementation. Karp Strategies' teams partner with clients to identify their unique needs and provide tailored solutions. They take analysis to action so that government agencies, private companies, and non-profit organizations can make better decisions and advance their projects. Karp Strategies' advisement is informed by deep, cross-sector experience throughout New York City, the Mid-Atlantic, and New England, including at city and regional agencies. Karp Strategies has extensive experience planning and executing meaningful stakeholder engagement, specifically to support and improve housing policies and processes. Many of their staff have backgrounds in affordable housing, including prior roles at New York City agencies and in the private sector. They have frequently partnered with NYC housing agencies, including DHS and NYCHA, to lead community engagement efforts and quantitatively and qualitatively analyze current programs and processes. With DHS, Karp Strategies coordinated and executed the 2019 HOPE survey, and subsequently evaluated future operations and staffing needs across 64 DHS facilities to implement a sustainable staffing and operational roadmap. They supported an affordable housing developer's bid to NYCHA by creating an accessible and inclusive resident engagement strategy to ensure residents are informed of current projects and are brought into the NYCHA decision-making process.

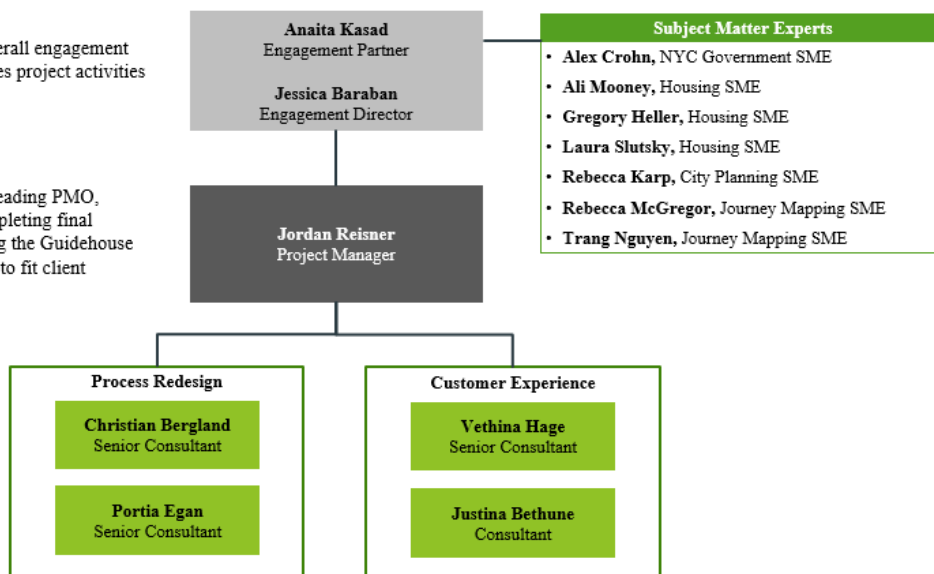
### ***3.2 Organizational Chart and Staff Resumes***

Guidehouse has assembled a team with the specialized knowledge and the hands-on experience necessary to provide the highest quality services to NYC HDC. If selected, Guidehouse will provide the City with a team of professionals that is ready to start immediately. Our **Engagement Partner** will be **Anaita Kasad**, who leads Guidehouse's State and Local Government practice. Anaita is an experienced leader of multiple consulting projects and brings over 20 years of experience helping government entities, including those in New York City and New York State, with some of their most important and high-profile projects. Anaita is a leader with strong program management, process improvement, and change management experience. The **Engagement Director** will be **Jessica Baraban**, who has over a decade of experience working with New York government clients to design strategies and improve operations that fulfill agency missions and serve customer needs. Jessica has overseen Guidehouse's work at NYCHA, which has spanned nearly every agency department and has provided a range of services from organizational design and journey mapping to change management and policy development. Together, Anaita and Jessica will provide leadership and consistent oversight to the project team.

**Engagement Leadership:** Leads overall engagement strategy. Responsible for and approves project activities and deliverables.

**Project Manager:** Responsible for leading PMO, providing oversight to staff, and completing final deliverables. Responsible for tailoring the Guidehouse methodologies and frameworks used to fit client needs.

**Day-to-Day Project Management:** Drives and executes project activities and development of deliverables.



**Figure 3. Project Team Organizational Chart**

Below is a summary of the relevant experience for our proposed project team. Detailed resumes are also included below.

**Key Personnel and Experience Highlights**

Name	Proposed Position	Relevant experience
Anaita Kasad	Engagement Partner	<ul style="list-style-type: none"> <li>Led the New York City Department of Homeless Services 90-day review of homeless service commissioned by the previous Mayoral administration.</li> <li>For the New York City Department for the Aging (DFTA), led a project seeking to redesign the City’s home-delivered meals programs.</li> </ul>
Jessica Baraban	Engagement Director	<ul style="list-style-type: none"> <li>Led the New York City Housing Authority, Customer Experience assessment to help the organization understand the current delivery of customer experience at key resident-facing touchpoints.</li> <li>For the New York City Department of Citywide Administrative Services (DCAS), led a team to assess the DCAS customer experience in support of the agency’s goal to become the City’s premier customer service agency.</li> </ul>
Jordan Reisner	Project Manager	<ul style="list-style-type: none"> <li>For New York State Insurance Fund, Jordan served as a project manager responsible for implementing recommendations from a journey mapping engagement.</li> <li>For the New York City Housing Authority, Jordan led a team of consultants on a project to assess and recommend a digitization roadmap.</li> </ul>
Alex Crohn	NYC Government SME	<ul style="list-style-type: none"> <li>For the Metropolitan Transportation Authority (MTA), Alex developed a set of recommendations to improve enrollment in the reduced-price MetroCard program for low-income individuals.</li> </ul>

		<ul style="list-style-type: none"> <li>For the New York City Police Department, Alex launched the agency's first ever customer service survey that was deployed through multiple channels, to provide commanders with actionable feedback to improve police services.</li> </ul>
Ali Mooney	Housing SME	<ul style="list-style-type: none"> <li>For the NYC Department of Housing Preservation and Development (HPD), Ali studied best practice models of Housing First models around the country and helped to bring the first Housing First development to NYC.</li> <li>For the United Way of Greater Philadelphia and Southern New Jersey, developing a housing strategy and framework to assist with shaping affordable housing strategies and solutions for Philadelphia.</li> </ul>
Gregory Heller	Housing SME	<ul style="list-style-type: none"> <li>For the Housing Authority of Los Angeles (HACLA), Greg helped perform a process analysis of the agency's Housing Choice Voucher (Section 8) program, resulting in a set of short-term and mid-term actionable strategies.</li> <li>For the Commonwealth of Pennsylvania, Greg helped provide change management, process improvement, and technical assistance to the Department of Human Services in administering the state's \$1.2B in allocated emergency rental assistance funds.</li> </ul>
Laura Slutsky	Housing SME	<ul style="list-style-type: none"> <li>For the City of Jackson, MI, Laura is helping to develop an action-oriented housing needs assessment and strategy that will be used to shape local policy, programs, and funding decisions.</li> <li>For the New York City Department of Housing Preservation and Development (HPD), Laura held leadership positions, including overseeing the development, launch and implementation of the agency's \$23 million Green Housing Preservation Program.</li> </ul>
Rebecca Karp	City Planning SME	<ul style="list-style-type: none"> <li>For the New York City Housing Authority (NYCHA), Rebecca supervised the development of a strategic plan and evaluation framework for the NYCHA's Connected Communities Initiative, a program that aims to update the organization's urban design guidelines to improve residents' physical social connectivity and wellbeing.</li> </ul>
Rebecca McGregor	Journey Mapping SME	<ul style="list-style-type: none"> <li>For the City of New York, Rebecca is supporting the standup of the Mayor's Office of Efficiency, the City's first office that focuses on increasing efficiency and customer experience.</li> <li>For the New York City Department of Homeless Services, conducted a 90-day review of homeless service commissioned by the previous Mayoral administration.</li> </ul>
Trang Nguyen	Journey Mapping SME	<ul style="list-style-type: none"> <li>For the New York City Mayor's Office of Efficiency, Trang is leading a customer experience (CX) engagement, working with over 60 New York City agencies on secret shopper programs, journey mapping, and the development of CX plans.</li> <li>For the City of San José, Trang led the customer personas and journey mapping engagement, including customer research across all City service areas.</li> </ul>

Christian Bergland	Senior Consultant	<ul style="list-style-type: none"><li>For the New York City Housing Authority (NYCHA), Christian supported a reorganization of the Authority's capital and real estate divisions, including process changes to strengthen and support the reorganization.</li></ul>
Portia Egan	Senior Consultant	<ul style="list-style-type: none"><li>For the Pennsylvania COVID-19 Emergency Rental Assistance Program, Portia supported the post-ERAP planning initiative.</li></ul>
Vethina Hage	Senior Consultant	<ul style="list-style-type: none"><li>For the City of Pittsburgh, Vethina created and implemented eight affordable housing programs for the Housing Opportunity Fund (HOF) of Pittsburgh.</li></ul>
Justina Bethune	Consultant	<ul style="list-style-type: none"><li>For the City of Jackson, MI helped to develop an action-oriented housing needs assessment and strategy that will be used to shape local policy, programs, and funding decisions.</li></ul>



### 3.2.1 Anaita Kasad, Engagement Partner

<b>Name</b>	<b>Anaita Kasad</b>
<b>Proposed Position</b>	Engagement Partner
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>BA, Economics, University of Pennsylvania</li> </ul>
<b>Relevant/Key Qualifications</b>	
<p>Anaita Kasad has more than 20 years of consulting experience including extensive program management expertise for state and local governments. She has focused on customer experience, operational process redesign, and program management. Anaita has extensive experience working with federal grant programs, such as FEMA PA, and CDBG-DR, and she has experience working on projects related to housing and homeless services.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>For the New York City Department of Homeless Services, Anaita provided oversight for the 90-day review of homeless service commissioned by the previous Mayoral administration. Anaita oversaw stakeholder interviews, client and staff surveys, and customer experience process maps. Results included a series of reforms and recommendations aimed at enhancing service to citizens experiencing or at risk of experiencing homelessness, including the use of data analytics to identify those most at risk.</li> <li>For the New York City Department for the Aging, Anaita led a project seeking to redesign the City’s home-delivered meals programs, engaging with non-profit advocacy groups and the thousands of seniors who receive home delivered meals to understand preferences and capabilities.</li> <li>For the New York City Department of Education (NYC DOE), Anaita is leading a team responsible for supporting the upgrade of an antiquated student transportation technology infrastructure. The system modernization effort is intended to improve efficiency and accuracy in operations; increase data quality and reporting; achieve greater vendor accountability; provide a better service and user experience to students, caregivers, and schools; and increase the alignment of OPT’s technology systems with DOE for interoperability.</li> <li>For the Metropolitan Transportation Authority (MTA), Anaita led a team in assessing the possibility of consolidating various back-office functions in a shared service center to process HR and Finance transactions. The team evaluated the technology platforms of the individual agencies and created application architecture, using PeopleSoft ERP technology, to serve as the foundation of the center. Following this, the team transitioned into the role of Quality Assurance monitor over the \$125M implementation, helping to ensure the project was completed on time and according to budget.</li> <li>For the New York City Housing Authority (NYCHA), Anaita led the analysis and recommendations around developing an improved customer channel strategy, including developing a shared services organizational model, consolidating call centers, and conducting future state staffing analysis. She also provided program management on an agency-wide CRM implementation, coordinating the functional requirements review, business process analysis, and project plan oversight.</li> <li>For the New York City Housing Authority, Anaita led an engagement to gather requirements to sunset its outdated Tenant Information and Rent Collection Systems, currently operating on the AS/400 platform, and implement a more modern system. Anaita led the team in performing a current state analysis of business processes and legacy systems to highlight pain points and suggest improvements to be implemented with the future system. Deliverables included a detailed requirements traceability matrix as well as a roadmap to assist in execution.</li> <li>For the City and County of Denver-Mayor’s Office, Anaita led a team by conducting an organizational and strategy assessment of Denver’s Road Home (DRH) assessing the current state of the organization by the reviewing reports and interviews to align the goals and metrics to a larger city strategy on homelessness and also created clear next steps for DRH, which included an organizational restructuring and an elevation to a cabinet position in the Mayor’s Office.</li> </ul>	

### 3.2.2 Jessica Baraban, Engagement Director

<b>Name</b>	<b>Jessica Baraban</b>
<b>Proposed Position</b>	Engagement Director
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• MBA, Columbia Business School</li> <li>• BA, Communication Studies and Legal Studies, Northwestern University</li> </ul>
<b>Relevant/Key Qualifications</b>	
<p>Jessica is a Director in Guidehouse’s State and Local Government practice focused on serving New York City and New York State clients. She has over a decade of experience working with government agencies to design strategies and improve operations that fulfill missions and serve customer needs. Jessica focuses on projects from strategy through execution and specializes in transformation planning, operational efficiencies, organizational design, workforce development, customer experience, regulatory compliance, change management, and project management. Jessica has worked extensively in housing and oversees Guidehouse’s engagements at the New York City Housing Authority.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the New York City Housing Authority (NYCHA), Jessica led a customer experience assessment to help the organization understand the current delivery of customer experience at key resident-facing touchpoints. During this effort, Jessica oversaw staff interviews, directed research initiatives, hosted a focus group with residents and helped the team establish a framework to analyze organization-wide data to identify opportunities to better serve residents. As part of this effort, Jessica provided oversight to an observational approach to review staff interactions to effectively log typical resident interactions with staff. This work culminated with the development of a set of strategic and tactical recommendations to surface and address performance gaps.</li> <li>• For the New York City Housing Authority (NYCHA), Jessica led an assessment of the agency’s procurement processes that included stakeholder interviews, desktop research and document review providing recommendations to improve NYCHA’s purchasing power, decrease its procurement cycle times, enhance its stakeholder experience, and increase its regulatory compliance.</li> <li>• For the New York City Housing Authority (NYCHA), Jessica led a team providing change management, implementation, and project management support for the Transformation Plan, an ambitious, multi-year strategy to improve the way NYCHA conducts business. Jessica provided strategic direction on Guidehouse’s deliverables including the team’s communication strategy, change management plan, change readiness assessment, and implementation plan.</li> <li>• For the Port Authority of New York and New Jersey (PANYNJ), Jessica led a team to develop a comprehensive Customer Experience (CX) strategy for the Tunnels, Bridges, and Terminals department (TB&amp;T). The team completed an in-depth assessment of CX that included interviews with key stakeholders at each of TB&amp;T’s eight facilities, shadowing front-line and technical staff, conducting Salesforce and survey data analysis, and interviewing leading peer organizations.</li> <li>• For the Metropolitan Transportation Authority (MTA), Jessica managed a team to conduct an organizational assessment of the HQ Pension and Human Resources departments. The team documented 125 processes and identified 50+ areas to improve quality and efficiency.</li> <li>• For the Metropolitan Transportation Authority (MTA), Jessica managed a team to assess the agency’s six public-facing contact centers and provided a roadmap for improvement. Jessica led the team in evaluating the customer experience and conducted mystery shopping.</li> <li>• For the New York City Department of Citywide Administrative Services (DCAS), Jessica led a team to assess the DCAS customer experience in support of the agency’s goal to become the City’s premier customer service agency. DCAS engaged Guidehouse to perform a current state assessment to understand what was working well and areas for improvement to enhance service to agency customers. The recommendations and roadmap the team provided has helped DCAS create an improved structure and refine internal processes to prioritize customer experience agencywide.</li> </ul>	



### 3.2.3 Jordan Reisner, Project Manager

<b>Name</b>	<b>Jordan Reisner</b>
<b>Proposed Position</b>	Project Manager
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• Master of Public Administration, Columbia University</li> <li>• BA, Economics, Rutgers College</li> </ul>
<b>Relevant/Key Qualifications</b>	
<p>Jordan is a Managing Consultant with Guidehouse’s State and Local Government practice. He has significant cross-sector experience leading teams, projects and programs across technology innovation, operational improvements, change management, policy and data analysis, regulatory compliance, and risk management. Prior to joining Guidehouse, Jordan worked at the NYC Department of Health and Mental Hygiene and the NYC Consumer Affairs Department.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the NYS Office of Temporary and Disability Assistance (OTDA) Emergency Rental Assistance Program (ERAP), Jordan projected managed several workstreams with 60+ team members and served as one of the key GH leaders with the OTDA Executive Team. Jordan drove efforts to establish policies, procedures, process flows and training materials to process applications effectively and efficiently for an engagement with total assistance, obligated and/or paid, of \$2.8 billion.</li> <li>• For the New York State Insurance Fund (NYSIF), Jordan served as a project manager responsible for implementing recommendations from a journey mapping engagement. The goals and objectives of the project were to redesign the billing process and drive policyholders to online tools. The team interviewed policyholders, conducted a survey with Contact Center staff, and performed leading practice research to apply lessons learned for the implementation.</li> <li>• For the New York City Housing Authority (NYCHA), Jordan led a team of consultants on a project to assess and recommend a digitization roadmap. The work has entailed interviewing stakeholders and understanding document management processes, performing evaluation of regulatory requirements, assessing technology needs, identifying operational challenges, and conducting visioning sessions to design the future digital records vision. The outcome is expected to be a scope of work for an RFP on backfile conversion along with management recommendations spanning implementation, change management, technology deployment and operational improvements.</li> <li>• For the New York State Energy Research &amp; Development Authority (NYSERDA), Jordan served as client lead that issued recommendations to improve mobility, reduce greenhouse gas emissions and improve economic development in small cities in upstate New York.</li> <li>• For the NYC Department of Health and Mental Hygiene, Jordan served as the Continuity of Operations Deputy Team lead during Covid-19 response. In addition, he led strategic initiatives that improved operational efficiency and program delivery, and managed interagency programs and practices with partner agencies, including Department of Education and Department of Youth and Community Development. As a project manager, Jordan and his team streamlined approaches to project management, contract administration, vendor relationships and procurement, and evaluated processes for maintaining and operating programs and providing recommendations for innovation.</li> <li>• For the NYC Consumer Affairs, Jordan was responsible for managing a portfolio of strategic projects, aligning to agency priorities, working closely with senior leadership. As a program manager for an interagency initiative to create a less burdensome regulatory climate for businesses, Jordan and his team established practices to make agency services easier to navigate. He administered policy implementation across the agency, leading analysis and requirements gathering on proposed laws and rules, evaluating impact on the agency and its operations, and managing deliverables across divisions to meet new mandates. He also advised on policy and operational issues, identifying best practices and delivering recommendations to senior leadership.</li> </ul>	

### 3.2.4 Alex Crohn, NYC Government Subject Matter Expert (SME)

<b>Name</b>	<b>Alex Crohn</b>
<b>Proposed Position</b>	NYC Government Subject Matter Expert
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• JD, Harvard Law School</li> <li>• BA, Political Science, Columbia University</li> </ul>
<b>Relevant/Key Qualifications</b>	
<p>Alex is a Director with Guidehouse’s State and Local Government Practice. He has a decade of experience working in senior positions within state and local government, most recently as the Director of Research and Innovation at the New York City Police Department. He has experience in devising policy solutions to difficult problems, developing and implementing change management strategies, evaluating the efficacy of government programs, and managing large and complex projects.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the Metropolitan Transportation Authority (MTA), Alex developed a set of recommendations to improve enrollment in the reduced-price MetroCard program for low-income individuals. Alex conducted interviews with advocacy groups and social service organizations, created customer journey maps, and ultimately presented a set of recommendations to the MTA’s “Fairness Panel” made up of transit and equity experts.</li> <li>• For the New York City Police Department, Alex managed the development and implementation of a mobile application to improve police community relations that is now used by 6,000 officers. The application allows officers to track community concerns and collaborate on long term crime and quality of life conditions. The project involved requirements gathering, IT vendor management, and development of change management and training materials.</li> <li>• For the New York City Police Department, Alex led a project to analyze whether racial and gender disparities existed in the police officer hiring process. The project required data analysis at all levels of the hiring process. Alex recommended and implemented reforms to remedy problems that were identified in the fitness test, background check and psychological examination.</li> <li>• For the New York City Police Department, Alex launched the agency’s first ever customer service survey that was deployed through multiple channels, to provide commanders with actionable feedback to improve police services. The project required the development of survey instruments and developing multiple deployment channels to reach a broad spectrum of survey respondents.</li> <li>• For the New York City Police Department, Alex partnered with a major research organization to evaluate the effectiveness of a new patrol model using crime and neighborhood sentiment data.</li> <li>• For the New York City Mayor’s Office of Criminal Justice, Alex managed the \$17.8 million expansion of supervised release, which supervises individuals in the community during the pendency of their criminal case and serves 3,400 people annually. The project required the development of an appropriate supervision model and extensive stakeholder engagement to ensure successful implementation.</li> <li>• For the New York City Mayor’s Office of Criminal Justice, Alex created a program to reduce missed court appearances by 20% by providing individuals charged with low level crimes with text message reminders and other behavioral nudges.</li> </ul>	

### 3.2.5 Ali Mooney, Housing Subject Matter Expert (SME)

<b>Name</b>	<b>Ali Mooney</b>
<b>Proposed Position</b>	Housing Subject Matter Expert (SME)
<b>Degree/ Education</b>	<ul style="list-style-type: none"> <li>• MUP, Housing and Community Development, CUNY Hunter College</li> <li>• BBA, Marketing, University of Massachusetts-Amherst</li> </ul>
<b>Summary of Qualifications</b>	
<p>Ali Mooney is a Managing Consultant at Guidehouse with over a decade of experience in affordable housing and community development. Prior to joining Guidehouse she managed the Emergency Rental Assistance Program (ERAP) for the City of Philadelphia. Philadelphia’s rental assistance programs received national attention for their success in effectively and efficiently deploying federal funds and were praised by US Department of Treasury and featured on CNN and the front page of The New York Times. In addition to ERAP, Ali managed a pilot Universal Basic Income study, a \$40 million low-income home repair loan program and four other affordable housing programs operated by the agency. Ali has also held various roles at the NYC Department of Housing Preservation and Development, including overseeing the pre-development and financing of supportive housing buildings. Ali is adept at creating and implementing innovative solutions to complex affordable housing problems. She is a member of the Urban Land Institute’s (ULI) National Housing Exchange, the ULI Philadelphia Local Housing Product Council, and Women in Housing and Finance. Ali was named Innovator of the Week by the Bloomberg Cities Network for her work on the Philadelphia ERAP program and recently participated in the 2022 Greater Philadelphia Leadership Exchange. Ali currently serves on the board of directors for Women in Transition, a Philadelphia area nonprofit that empowers people to move forward with lives free of domestic violence, intimate partner violence, and substance abuse. Ali also has experience working in housing and community development in New York, NY and Milwaukee, WI.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the United Way of Greater Philadelphia and Southern New Jersey, Ali is developing a housing strategy and framework to assist with shaping affordable housing strategies and solutions for Philadelphia. This process includes stakeholder engagement and interviews with funders, developers, private and public-sector organizations, philanthropies, and the academic community. The goal of this engagement is to create investible affordable housing pilot programs and to position the United Way as a thought leader on housing policy and solutions moving forward.</li> <li>• For the Housing Needs Assessment for the City of Jackson, MI, Ali worked to create a long-term housing plan and policy guide to assist with deploying a portion of their American Rescue Plan Act funds.</li> <li>• For the NYC Dept of Housing Preservation and Development (HPD) in the Division for Special Needs Housing, Ali oversaw the pre-development, financing, and construction of congregate supportive housing buildings with supportive services. Ali was the main liaison between HPD and the NYC CoC. She assisted in updating the CoC by-laws and applied for Shelter plus Care (now CoC) funding for over 50 rental assistance contracts, worth over \$20 million.</li> <li>• For the NYC Dept of Housing Preservation and Development (HPD), Ali organized the “Good Neighbor Initiative”—a campaign to dispel the negative stereotypes associated with supportive housing. Ali educated local elected officials and community board members about homelessness and supportive housing residents.</li> <li>• For the NYC Dept of Housing Preservation and Development (HPD), Ali monitored and analyzed changes to the HOME program and McKinney-Vento Homeless Assistance Act and amended our program policies and procedures to ensure compliance with changing guidance.</li> <li>• For the NYC Dept of Housing Preservation and Development (HPD), Ali studied best practice models of Housing First models around the country and helped to bring the first Housing First development to NYC.</li> </ul>	

### 3.2.6 Gregory Heller, Housing Subject Matter Expert (SME)

<b>Name</b>	<b>Gregory Heller</b>
<b>Proposed Position</b>	Housing Subject Matter Expert (SME)
<b>Degree/ Education</b>	<ul style="list-style-type: none"> <li>BA, American Studies and German Studies, Wesleyan University</li> </ul>
<b>Summary of Qualifications</b>	
<p>Gregory Heller is a Director at Guidehouse who leads the firm’s Housing &amp; Community Solutions practice. He has significant experience with both public-sector and commercial clients working on housing programs and policy, community finance, real estate advisory, and local reinvestment strategies. He was previously Executive Director of the Philadelphia Redevelopment Authority where he oversaw an array of housing finance programs and public land redevelopment.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>For the Housing Authority of Los Angeles (HACLA), Greg helped perform a process analysis of the agency’s Housing Choice Voucher (Section 8) program, resulting in a set of short-term and mid-term actionable strategies.</li> <li>For the City of Jackson, MI, Greg is helping to develop an action-oriented housing needs assessment and strategy that will be used to shape local policy, programs, and funding decisions. Work includes data analysis, public engagement, national best practices research, and program design and development.</li> <li>For Travis County, TX, Greg is assisting the County in reviewing affordable housing projects that may be financed with federal ARPA funds. Tasks include helping interpret and understand federal policy; project review and underwriting; developing frameworks, processes, and documents for County use; and providing support in reviewing invoices and processing progress payments.</li> <li>For the State of New York, Greg is assisting with policy and program-design related to developing, deploying and maintaining an application, staffing, quality control and oversight, and overall program delivery of \$3B in Emergency Rental Assistance Program (ERAP) funds.</li> <li>For the State of South Carolina, Greg helped administer the statewide program to distribute over \$500M in emergency rental assistance and \$144M in homeowners assistance. He worked with the client to develop innovative strategies that were highlighted by the White House and National Low Income Housing Coalition, to ensure the funds aided as many households as possible.</li> <li>For the Commonwealth of Pennsylvania, Greg helped provide change management, process improvement, and technical assistance to the Department of Human Services in administering the state’s \$1.2B in allocated emergency rental assistance funds. Work also involves developing longer-term housing stability approaches after ERA funds are no longer available.</li> <li>For the State of Vermont, Greg provided a rapid assessment of the statewide emergency rental assistance program, and then worked with the state for a year afterwards helping to implement the recommendations. Vermont was a major success story ending up expending or obligating all of its available federal funds.</li> <li>For the State of Florida, Greg provided rapid assessment of the statewide emergency rental assistance program, with identified strategies for change management and process improvement.</li> <li>For the City of Baltimore, Greg is managing operations to distribute \$15M of ERA funds. Work involves building the administrative plan; onboarding, training and managing staff; and providing reporting and policy support.</li> </ul>	

### 3.2.7 Laura Slutsky, Housing Subject Matter Expert (SME)

<b>Name</b>	<b>Laura Slutsky</b>
<b>Proposed Position</b>	Housing Subject Matter Expert
<b>Degree /Education</b>	<ul style="list-style-type: none"> <li>• MPA, University of Pennsylvania</li> <li>• BA, Sociology, Cornell University</li> </ul>
<b>Summary of Qualifications</b>	
<p>Laura Slutsky is an Associate Director at Guidehouse in the Housing and Community Solutions Team. She brings over fifteen years of public and nonprofit experience in community development, affordable housing finance, disaster recovery, and sustainability. She has expertise in program design and execution including grant management, real estate transactions, stakeholder management, and deploying public funds. She previously served as Special Assistant to the Secretary at the U.S. Department of Housing and Urban Development and was in a senior leadership role at New York City Department of Housing Preservation and Development.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For Travis County, TX, Laura is assisting the County in establishing policy recommendations and due diligence review of affordable housing projects financed with federal ARPA funds. Role includes helping interpret and understand federal policy; project review; developing frameworks, processes, and documents for County use; and providing policy support.</li> <li>• For the City of Jackson, MI, Laura is helping to develop an action-oriented housing needs assessment and strategy that will be used to shape local policy, programs, and funding decisions. Work includes data analysis, public engagement, national best practices research, developing a methodology to establish housing targets and program design and development.</li> <li>• For the United Way of Greater Philadelphia, Laura is helping to design a Housing Strategy and Framework to synthesize the knowledge of public, private, nonprofit, and academic stakeholders and develop actionable and financeable cross-sector solutions. Role includes leading stakeholder interviews, performing coding and analysis of feedback, and developing recommendations.</li> <li>• For the New York City Department of Housing Preservation and Development (HPD), Laura held leadership positions overseeing the development, launch and implementation of the agency’s \$23 million Green Housing Preservation Program, including managing a pipeline of transactions, establishing policies, led partnerships with lending institutions and foundations, and leading interagency policy initiatives to integrate energy efficiency, water conservation, health and resilience across program financing.</li> <li>• For the New York City Mayor’s Office of Storm Recovery, Laura managed a federally funded loan program and served as a policy advisor for the New York City Superstorm Sandy housing recovery funds. Laura executed real estate closings to deploy public sector affordable housing financing products for approximately 300 units annually, including borrower intake, underwriting, scoping and due diligence. She drafted term sheet for a new program and negotiated terms with nonprofit and private developers, and oversaw approval process with the budget office, participated in credit committee, and coordinated with construction division.</li> <li>• For the Urban Land Institute’s (ULI) Philadelphia District Council, Laura led and executed a portfolio of advisory services work for a range of municipal and nonprofit partners. Work included development of scopes and partners to support nonprofit and public sector land use needs, identifying stakeholders, consolidating relevant research, assembling expert panels, leading operations of engagements, and development reports. Specific report topics include addressing Naturally Occurring Affordable Housing (NOAH), healthy corridors, pier development with a consideration for climate change, and park redevelopment. She created and led product councils, networks of practitioners focused advancing on land use and real estate topic areas.</li> </ul>	



### 3.2.8 Rebecca Karp, City Planning Subject Matter Expert (SME)

<b>Name</b>	<b>Rebecca Karp</b>
<b>Proposed Position</b>	City Planning Subject Matter Expert
<b>Degree /Education</b>	<ul style="list-style-type: none"> <li>• Master in City Planning, Massachusetts Institute of Technology</li> <li>• BA, Sociology, Bowdoin College</li> </ul>
<b>Summary of Qualifications</b>	
<p>Rebecca is a leading urban planning professional with extensive experience conducting market analysis studies across the northeast and regularly leads complex economic and workforce development strategic initiatives. Rebecca Karp founded Karp Strategies following nearly a decade in urban planning, policy, operations, and management roles in the public and private sectors. She understands the complexity of developing, executing, and evaluating development programs, and to these situations, Rebecca and Karp Strategies utilize a data driven, qualitative, and place-based approach to holistically evaluate and successfully tackle problems. Recent work includes leading workforce development initiatives for multiple offshore wind developers, crafting tailored stakeholder engagement strategies, and building economic landscape analysis. Rebecca leverages her extensive experience in order to deliver outstanding results for clients.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the New York City Housing Authority (NYCHA), Rebecca supervised the development of a strategic plan and evaluation framework for the NYCHA’s Connected Communities Initiative, a program that aims to update the organization’s urban design guidelines to improve residents’ physical social connectivity and wellbeing. In this role, she oversaw the development of participatory action research methods to include NYCHA residents in the evaluation of the initiative’s success.</li> <li>• Rebecca conducted a Vital Brooklyn market analysis and MWBE strategy, where she advised on the market analysis, stakeholder engagement, and MWBE participation portion of a major RFP response for a mixed-use development with focus on supportive and affordable housing in Brooklyn.</li> <li>• For Ocean Bay (Bayside) Apartments, Rebecca was the project director for evaluation of Rental Assistance Demonstration (RAD), a program aimed to protect long term affordability at NYCHA properties by leveraging additional funding from the private sector. In this role, she led development of research design and protocols, and executed focus group and interviews with NYCHA residents and employees about NYCHA’s engagement during the initial RAD transition and experience under new property management. This work resulted in a final analysis and report.</li> <li>• For Atlanta Shores Offshore Wind, Rebecca was the project advisor that led the development of a stakeholder engagement strategy for Atlantic Shores Offshore Wind, an industry developer seeking to build wind infrastructure off the Northeast coast of the U.S. She led a team conducting stakeholder mapping to harness the complex political and social environments of the local area. Rebecca led teaming partners in developing a competitive landscape analysis, social impact and workforce development analysis to strengthen the local economy. Rebecca also led economic development strategy for Atlantic Shores through the investigation and development of community partnerships.</li> <li>• For Long Island City, Rebecca directed the creation of a comprehensive market analysis and public policy evaluation for a mixed-use waterfront district in Long Island City, with particular focus on inclusive economic and workforce development. Rebecca oversaw commercial and industrial profiles, socioeconomic analysis, and national and international case studies. She delivered a highly visual report that provides holistic analysis of economic trends, inclusive development opportunities, and project feasibility.</li> </ul>	

### 3.2.9 Rebecca McGregor, Journey Mapping Subject Matter Expert (SME)

<b>Name</b>	<b>Rebecca McGregor</b>
<b>Proposed Position</b>	Journey Mapping Subject Matter Expert (SME)
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>MA, Public Policy, Georgetown University</li> <li>BA, Government and Politics, University of Maryland, College Park</li> </ul>
<b>Relevant/Key Qualifications</b>	
<p>Rebecca has been managing government customer experience and change management projects for a decade. In addition to managing the complexities of project timelines, budgets, and managing client communications, Rebecca’s functional experience focuses on understanding the experience of those interacting with government services and she has developed a variety of internal staff surveys.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>For the Commonwealth of Pennsylvania, Department of Human Services (DHS), Rebecca is the director overseeing Guidehouse’s work supporting DHS and the 67 counties who have received Emergency Rental Assistance Program (ERAP) funds. Rebecca and her team are advising DHS on policies, data reporting, and providing monitoring and compliance support.</li> <li>For the City of New York, Rebecca is supporting the standup of the Mayor’s Office of Efficiency, the City’s first office that focuses on increasing efficiency and customer experience. Rebecca and her team support the coordination of customer experience projects for numerous City agencies, including tools and techniques such as time tax calculations, customer journey mapping, persona development, and more. The team also supports all City agencies with their development of their Customer Experience strategies, and helps refine and review Customer Experience initiatives, strategies, and performance metrics. Rebecca and her team are instrumental in efforts to improve experiences and government operations for the biggest City government in the United States.</li> <li>For the New York City Department of Homeless Services, Rebecca was the project manager for the 90-day review of homeless service commissioned by the Mayor. Rebecca managed stakeholder interviews, client and staff surveys, and customer experience process maps. Results included a series of reforms and recommendations aimed at enhancing service to citizens experiencing or at risk of experiencing homelessness, including the use of data analytics to identify those most at risk.</li> <li>For the New York State Insurance Fund (NYSIF), Rebecca has managed multiple projects to improve the customer experience and internal operations. Rebecca led projects that helped NYSIF understand the customer journey via journey mapping techniques. These projects focused on specific pain points and difficult experiences that NYSIF had identified, including the Premium Audit process and the billing process. Rebecca also led a study of internal underwriting processes to help NYSIF identify processes that could benefit from enhanced automation.</li> <li>For a large Midwestern State, Rebecca managed the set up and management of the Project Management Office for a large IT implementation office. As part of this work, Rebecca developed a change readiness survey to gauge thousands of users on their readiness for change and developed communication strategies based on user feedback and concerns.</li> <li>For the New York City Department for the Aging, Rebecca managed a project seeking to redesign the City’s home-delivered meals programs, engaging with non-profit advocacy groups and the thousands of seniors who receive home delivered meals to understand preferences and capabilities.</li> <li>For a US federal agency, Rebecca was the project manager for a large customer consulting engagement. She advised the Director of Customer Experience on customer engagement and digital strategy, as well as methods to create a more customer-centric culture within the organization.</li> <li>For a US federal agency, Rebecca led a multi-phased customer study using a variety of survey and analytic techniques including conjoint analysis and cluster analysis, which uncovered customer preferences. She also advised on customer segmentation efforts, including the development of customer personas, and designed, implemented, and managed internal staff satisfaction surveys.</li> </ul>	

### 3.2.10 Trang Nguyen, Journey Mapping Subject Matter Expert (SME)

<b>Name</b>	<b>Trang Nguyen</b>
<b>Proposed Title</b>	Journey Mapping Subject Matter Expert (SME)
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• MPH, Health Policy and Management, University of Georgia</li> <li>• BA, Communication Studies, University of Georgia</li> </ul>
<b>Summary of Qualifications</b>	
<p>Trang is a Managing Consultant and subject matter expert in customer experience and journey mapping. She has supported a range of public health, commercial health, and state clients with change management, stakeholder analysis and adoption strategies, project management, and behavior change communications. She is a certified Project Management Professional (PMP) and Certified Change Management Professional (CCMP). She has also completed coursework in Human-Centered Design.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the New York City Mayor’s Office of Efficiency, Trang is leading a customer experience engagement. This work includes working with over 60 New York City agencies to advise on and provide direct implementation support for secret shopper programs, customer research and journey mapping, and the development of customer experience (CX) plans. As part of this engagement, the team has developed a comprehensive CX Toolkit, conducted direct customer and frontline staff research with over 20 agencies to build out agency process and customer journey maps, and supported MOE in strategic planning for how to build out CX work across the City. This work included a time tax study, process maps, and journey maps for the Department Housing Preservation Development Senior Citizen Rent Increase Exemption program.</li> <li>• For Covered California, Trang is currently serving as the customer experience subject matter expert and project lead for a CX Key Performance Indicators (KPIs) and dashboard implementation engagement, building upon the original customer journey mapping and implementation work from prior phases.</li> <li>• For the City of San José, Trang led the customer personas and journey mapping engagement, including customer research across all City service areas. During the Discovery Phase of this engagement, the team has conducted mystery shopping, call observations, front desk observations, and customer intercept interviews. This research and the subsequent personas and journey maps will inform future customer service standards and recommendations for the City.</li> <li>• For the Federal Emergency Management Agency Hazard Mitigation Assistance program, Trang is serving as a customer journey mapping subject matter expert to help the agency better understand customer experiences and support an overall internal culture change. This work includes customer research and personas and journey mapping development for key internal and external customers.</li> <li>• For the Adams County Department of Human Services, Trang served as a customer journey mapping subject matter expert to help the Department understand customer experiences when seeking and accessing their services. The project included conducting customer segmentation to identify key customer groups, customer research and engagement, and the development of personas, current and future state maps, and recommendations to improve the customer experience.</li> <li>• For Covered California, Trang led a customer experience implementation analysis, building on the findings of prior customer journey mapping work. This analysis was focused on current state roles and responsibilities, processes, and barriers to change. Previously, she supported the development of personas and consumer journey maps to better understand the consumer experience from initial enrollment in health insurance to maintaining coverage and accessing care. She has completed internal and external stakeholder interviews with qualified health plans, agents, navigators, and system integrators; conducted direct consumer outreach and shadowed Service Center Representatives (SCRs) to capture the voice of the consumer; and analyzed documentation and data from across the organization to build a picture of the current state consumer journey.</li> </ul>	



### 3.2.11 Christian Bergland, Senior Consultant

<b>Name</b>	<b>Christian Bergland</b>
<b>Proposed Position</b>	Senior Consultant
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• MSc, Public Policy, Carnegie Mellon University</li> <li>• BA, Political Science, McGill University</li> </ul>
<b>Summary of Qualifications</b>	
<p>Christian is a Senior Consultant with Guidehouse’s State and Local Government Practice. He is skilled in project management and has extensive public sector sustainability experience, including developing learning tools and resources, supporting legislative action, and promoting economic development. Christian has extensive experience translating qualitative and quantitative research into data-driven and actionable government policy. Christian has worked on several projects supporting the New York City Housing Authority’s Procurement and Asset &amp; Capital Management functions with organizational integration, process improvement, and advanced analytics</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the Tennessee Valley Authority (TVA), Christian supported TVA’s Connected Communities team, focused on identifying opportunities to solve community challenges using pilot demonstrations of innovative technologies, with his work including stakeholder engagement and outreach and strategy development.</li> <li>• For the New York City Housing Authority (NYCHA), Christian led initiatives focused on overhauling the organization’s construction management and scheduling approaches, working closely with senior executives and subject matter experts to align approaches with short-term organizational priorities and long-term strategy and leading stakeholder engagement activities to help ensure organizational buy-in.</li> <li>• For the New York City Housing Authority (NYCHA), Christian supported a reorganization of the Authority’s capital and real estate divisions, working closely with NYCHA senior leadership with a bottom-up, working group-driven approach to align reorganization decisions with short- and long-term organizational strategy, as well as related process changes to strengthen and support the reorganization.</li> <li>• For the New York City Housing Authority (NYCHA), Christian supported senior leadership in implementing the Authority’s Capital Readiness Plan, developing implementation strategy, and coordinating with key stakeholders across the Capital division to help ensure timely and effective implementation of key organizational goals.</li> <li>• For five Illinois utilities, Christian led economic impact modeling of utility-driven energy efficiency programs, determining program impact at the local and statewide level to help utility stakeholders and policymakers to better inform sustainability policy with economic knowledge.</li> <li>• For the New York City Housing Authority (NYCHA), Christian supported an organizational assessment of the organization’s Leased Housing Department, focusing on identifying inefficient processes and determining organizational change opportunities.</li> <li>• For the New York City Housing Authority (NYCHA), Christian led an assessment of workload distribution within the organization’s Capital Planning Division, focusing on staffing decisions, workload capacity, and hiring and retention processes.</li> <li>• For the New York City Housing Authority (NYCHA), Christian led an assessment of the organization’s capital planning procurement function, identifying opportunities for continuous process improvement and process standardization, enhanced vendor relations, and organizational structure.</li> <li>• For the New York City Housing Authority (NYCHA), Christian supported an assessment of the agency’s inventory management function, providing recommendations around improvements to organizational structure, accountability, and training, as well as opportunities for improved efficiency through technology optimization.</li> </ul>	

### 3.2.12 Portia Egan, Senior Consultant

<b>Name</b>	<b>Portia Egan</b>
<b>Proposed Position</b>	Senior Consultant
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• Master of Public Affairs, Indiana University</li> <li>• BA, English, DePauw University</li> </ul>
<b>Summary of Qualifications</b>	
<p>Portia Egan is a Senior Consultant at Guidehouse in the Housing &amp; Community Solutions practice. She works with a team of housing and community development subject-matter experts who work with both public-sector and commercial clients on housing programs and policy, community finance, real estate advisory, and local reinvestment strategies.</p> <p>Prior to joining Guidehouse, Portia held a management position in Philadelphia’s local government as a program manager in the Policy and Programs Unit of the City’s Division of Housing and Community Development. In this role she worked on housing policy and program development alongside City leadership and partner agencies – most recently, Philadelphia’s nationally acclaimed Eviction Diversion Program. She executed the preparation of major federal funding applications and agency reports, including HUD Consolidated and Annual Action Plans. She developed data management systems, program databases, and public-facing dashboards, and collaborated with external research partners on survey research and program evaluations. Portia also worked to advance equity and evidence-based decision-making across City departments.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the Kentucky Cabinet of Human Services, Portia assisted the CHFS’ Office of Administration in documenting, refining, and aligning its processes to prepare for IT system implementation and to improve its overall operations and "pain point" processes across three core divisions – Facilities Management, Procurement and Grants Oversight, and General Accounting. Portia leads the facilities management workstream, which involves managing related workflows, liaising, and collaborating with division staff, and managing the team’s relationship with project partner, JLL, a real estate and investment management firm.</li> <li>• For the Kentucky Cabinet of Human Services, Portia evaluated over 100 technical policy and procedure documents, facilitated three on-site discovery sessions with division staff, conducted a SWOT analysis using 270 pieces of client input, and translated findings into over 30 actionable recommendations for the client. She has and will continue to create process maps for the divisions, utilizing existing documentation and in collaboration with leadership and staff. She will develop accompanying SOPs, help align processes in preparation for implementation of the client’s new IT system, and support SOP implementation including “train the trainer” activities for leadership and staff.</li> <li>• For the Pennsylvania COVID-19 Emergency Rental Assistance Program, Portia assisted developing trainings based on county needs and requests for support to help PA counties effectively and efficiently administer their Emergency Rental Assistance Programs (ERAPs). Tasks included developing monthly and ad hoc trainings, interpreting guidance, and funding requirements, and coordinating with guest speakers.</li> <li>• For the Pennsylvania COVID-19 Emergency Rental Assistance Program, Portia supported the post-ERAP planning initiative. Tasks included developing the overall research approach, leading data collection and processing, conducting exploratory data analysis and statistical analyses, designing a survey instrument, and identifying key findings to help inform the future of rental assistance programs in PA once ERAP funding is exhausted.</li> </ul>	

### 3.2.13 Vethina Hage, Senior Consultant

<b>Name</b>	<b>Vethina Hage</b>
<b>Proposed Position</b>	Senior Consultant
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• Master of Public Health Administration, DePaul University</li> <li>• BA, English, DePaul University</li> </ul>
<b>Summary of Qualifications</b>	
<p>Vethina Hage is a Senior Consultant in the Housing &amp; Community Solutions practice at Guidehouse and has over six years of public and nonprofit experience in affordable housing, community development, program design and policy and data analysis. She strives to create more equitable, vibrant communities that are accessible to all residents. Prior to Guidehouse she worked for the Urban Redevelopment Authority (URA) of Pittsburgh as the Housing Strategy Officer. Her primary responsibility was administering and managing the City of Pittsburgh’s first affordable housing trust fund, also known as the Housing Opportunity Fund (HOF). The HOF supports the development and preservation of affordable and accessible housing within the City of Pittsburgh.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For the City of Pittsburgh, Vethina created and implemented eight affordable housing programs for the Housing Opportunity Fund (HOF) of Pittsburgh including the Housing Stabilization Program, Down Payment and Closing Cost Assistance Program, Homeowner Assistance Program, Legal Assistance Program for Tenants and Homeowners, Rental Gap Program, For-Sale Development Program, and Small Landlord Fund Program. The HOF has assisted over 3,000 households across the City of Pittsburgh, with a focus on assisting the most at-risk communities.</li> <li>• For the City of Pittsburgh, Vethina launched the Welcoming America’s 2020 Welcoming Economies Technical Assistance Pilot (WE Pilot) program. The WE Pilot supports local leaders in advancing policies, programs, partnerships, and practices that include immigrants as part of their local or regional economic strategy.</li> <li>• For the City of Pittsburgh, Vethina assisted with community outreach and development to ensure equitable distribution of Housing Opportunity Funds totaling over \$40M.</li> <li>• For the Pennsylvania Department of Human Services, Vethina assisted with compiling the PA Rapid Assessment, leading the County Triage Workstream, and executing monitoring and compliance for counties within the Commonwealth.</li> </ul>	

### 3.2.14 Justina Bethune, Consultant

<b>Name</b>	<b>Justina Bethune</b>
<b>Proposed Position</b>	Consultant
<b>Degree/Education</b>	<ul style="list-style-type: none"> <li>• Master of Regional Planning/Affordable Housing, Cornell University</li> <li>• BA, Architectural Studies, Ithaca College</li> </ul>
<b>Relevant/Key Qualifications</b>	
<p>Justina Bethune is a Consultant in Guidehouse’s Housing &amp; Community Solutions team. She has six plus years of experience working in affordable housing, public administration, policy analysis, public speaking, leadership, data analysis, stakeholder engagement, and community outreach. She has worked closely with state and local governments advocating for better policies, practices, programs, and legislation to strengthen a state foster care system and low-income communities. She previously worked at New York State Office of Children &amp; Family Service, gathering housing resources for homeless youth, advocating for housing policy changes for foster care youth, and helping previously incarcerated persons locate adequate housing. There she created a housing resource guide for homeless, foster youth, and attended several housing and homeless conferences, guest speaking, and advocating for more housing and funding options for the homeless. Justina spoke at venues such as the OCFS Home-Finders Summit, the New York Public Welfare Association’s annual conferences, and various speak-out events around the East Coast. Started several campaigns to end homelessness including the “No More Trash Bags Campaign”. Justina received her Master of Regional Planning from Cornell University. She has published several documents on housing safety as well as a report evaluating New York State’s housing voucher programs. She is passionate about connecting members of all ages and races who are homeless and in lower-income communities to better housing resources and opportunities.</p>	
<b>Relevant Experience</b>	
<ul style="list-style-type: none"> <li>• For South Carolina Emergency Rental Assistance Program (ERAP), Justina provided support to SC Stay Plus as a liaison between operations and the GH utility team. Work included assisting with processing applications, contacting utility companies, and troubleshooting issues with SC systems.</li> <li>• For the City of Jackson, MI, Justina helped to develop an action-oriented housing needs assessment and strategy that was used to shape local policy, programs, and funding decisions. Work included data analysis, public engagement, national best practices research, and program design and development.</li> <li>• For the NYS Office of Children &amp; Family Services, NY, Justina helped to develop a housing resource guide, and helped change policies and programs in the NYS foster care system, informed best practices for NYC Juvenile Justice re-entry programs, evaluated housing vouchers and programs for foster youth ages 18-26. Justina was the leader of a 15-member team who advocated on behalf of more than 16,000 foster youth nationwide between the ages of 18 and 26. In this role, she was responsible for reviewing, updating, and amending NYS OCFS policies for internal and external guidance; ensuring the timely data collection and analysis of re-housing information for foster youth and homeless individuals for weekly reporting; initiating, planning, and executing five consecutive NYS annual Foster Care Awareness conferences and summits; and evaluating program performance for over 20 NYS voucher/housing programs identifying issues, providing alternative solutions, and producing and publishing as-needed housing documents. Justina also connected clients to support channels to fulfill their housing, utility, and food needs; providing them up to \$2,000 of funding to cover Covid-19 incurred costs, on behalf of a nationwide program that provides \$143 million annually in mandatory funding for under-served individuals.</li> </ul>	

## 4. Example Cases

### 4.1 Past Performances

Client/Project Title	Customer Experience	Process Improvement	Housing	NYC
New York City Mayor’s Office of Operations, Department of Homeless Services – 90-Day Review	✓	✓	✓	✓
New York City Housing Authority – Customer Experience Assessment	✓	✓	✓	✓
State of New York Office of Temporary & Disability Assistance – Emergency Rental Assistance Program	✓	✓	✓	✓
New York City Mayor’s Office of Efficiency – Customer Experience	✓	✓	✓	✓
New York City Housing Authority – Procurement Function Assessment		✓	✓	✓
Adams County Department of Human Services – Customer Journey Mapping	✓	✓	✓	
Port Authority of New York and New Jersey – Department of Tunnels, Bridges, and Terminals Customer Experience Strategy	✓	✓		✓
Metropolitan Transportation Authority – Fair Fares Assessment	✓	✓		✓
Metropolitan Transportation Authority – Contact Center Assessment	✓	✓		✓
Housing Authority of the City of Los Angeles – Business Process Review	✓	✓	✓	
United Way of Greater Philadelphia – Housing Strategy, Framework, and Solutions Design	✓	✓	✓	
City of Jackson, Department of Community Development – Housing Strategy and Policy Framework	✓	✓	✓	
State of New York Governor’s Office of Storm Recovery – Housing and Transportation Damage Assessment		✓	✓	✓
New York City Department of Citywide Administrative Services – Customer Experience and Service Function	✓	✓		✓
City of Denver Office of the Mayor – Denver Road Home	✓	✓	✓	
Metropolitan Transportation Authority – Pension and HR Organizational Assessment		✓		✓
City of San Jose – Customer Service Standards & Vision	✓	✓		
Covered California – Customer Journey Mapping	✓	✓		
California Department of Motor Vehicles – Performance Optimization	✓	✓		
Travis County Health and Human Services – COVID-19 Supportive Housing		✓	✓	
Recovery Innovations International – Los Angeles County Crisis Response Evaluation		✓	✓	

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#### 4.1.1 New York City Mayor’s Office of Operations - Department of Homeless Services 90-Day Review

##### Description of Services/Scope of Work

Guidehouse was engaged by the City of New York’s Mayor’s Office of Operations, in conjunction with the City’s Department of Homeless Services (DHS) and Human Resources Administration (HRA), to assist in City Hall’s 90-Day Review of homeless services operations and policies. With over 60,000 people living in Department of Homeless Services’ shelters and more living on the streets, DHS had seen its resources and abilities to shelter the City’s most vulnerable population stretched to their limit. To create a more efficient and sustainable agency able to confront the growing challenges of meeting its critical mission, DHS engaged Guidehouse to assess and improve its core back-end functions. Additionally, the City sought to improve processes to provide services to those experiencing or at risk of experiencing homelessness, which were often cumbersome and duplicative. People at risk of becoming homeless and those who were experiencing homelessness were often unsure of how to navigate an unclear and nonlinear process. Guidehouse visited shelter intake centers and homeless shelters, developing process maps highlighting pain points in the process from the client perspective. The team surveyed 725 DHS staff members and over 630 clients to determine recommendations to improve homeless services. Guidehouse also conducted over 70 interviews with service providers, City staff, and other key stakeholders to receive feedback on areas of opportunity for homeless services and specifically DHS. Guidehouse worked with the City to develop recommendations centered around four key elements – prevention, rehousing, street homelessness outreach and improving shelter conditions. The team developed a total of 46 individual systemic reforms, many of which, including the HomeSTAT program, were implemented. HomeSTAT coordinates canvassers working daily to connect unsheltered homeless to over 300 outreach workers who can link them to medical care, job training and housing. Recommendations also included an agency reorganization, with the Department of Homeless Services and Human Resources Administration now reporting to one Commissioner and sharing a consolidated service center. Reforms were estimated to cost \$66 million but lead to \$38 million in savings when back-office functions of the two agencies were combined.

#### 4.1.2 New York City Housing Authority – Customer Experience Assessment

##### Description of Services/Scope of Work

The New York City Housing Authority (NYCHA) engaged Guidehouse to assess the Authority’s approach to Customer Experience and to provide a set of recommendations to support the enhanced delivery of it. During this exercise, the work was focused on organizational culture, operational structure model, performance management, data use, resident communications, and process improvements. Guidehouse produced a current state assessment and a set of future state recommendations. NYCHA is the largest public housing provider in the US. Given its size, there are numerous entry points for customer interactions covering a variety of topics. Staff was interested in better understanding how customer experience is currently delivered and if the function should be consolidated in one department within the organization. Guidehouse evaluated the current approach to Customer Experience by collecting insights from NYCHA staff, analyzing data from previous resident services, developing customer journey maps, and holding a focus group discussion with residents. These inputs created the foundation for a deeper analysis on the supporting processes and structures that inform the current delivery of customer experience. Through our analysis, we identified the typical spots for resident interactions as well as surfacing what may contribute to inconsistent information or unmet customer expectations. Guidehouse then led working sessions with the client to both validate the current state of customer experience while also thinking through a set of strategic recommendations to both prioritizing and addressing specific areas.

### 4.1.3 State of New York Office of Temporary & Disability Assistance – Emergency Rental Assistance Program

#### Description of Services/Scope of Work

Guidehouse was retained by the New York State (NYS) Office of Temporary & Disability Assistance (OTDA) and is responsible for developing, deploying, and maintaining an application, staffing, providing quality control and oversight, and providing overall program delivery of \$46B+ of the Emergency Rental Assistance Program (ERAP) funds in New York State. In the overall program delivery, the Guidehouse team is supporting the State through the program design, technology standup, operations, and closeout phases. In the program design phases, the Guidehouse Team worked with the State to interpret state/local legislation into program guidelines, draft and maintain the overall “Administrative Plan,” memorialize policies & processes, determine the required review processes, and established staffing needs. For technology standup, the team determined case management technology requirements according to program guidelines, review workflows, data interfaces/exchanges, and established cybersecurity requirements & protocols. Given the quick ramp up needed, Guidehouse focused on firming up back-end project management with a team dedicated to designing, developing, and implementing policies, processes, and tools to manage the successful back-end operations of a 2,000+ FTE temporary organization. Specific areas of focus included: data security & provisioning of access to systems; training & onboarding; laptop deployment & IT help desk; contracting, subcontracting, and procurement; time and attendance; budgeting and forecasting of resource needs against program needs, attrition, and budget; and general vendor management.

### 4.1.4 New York City Mayor’s Office of Efficiency – Customer Experience

#### Description of Services/Scope of Work

The City of New York, including the Mayor’s Office of Efficiency (MOE) engaged Guidehouse to support over 60 New York City agencies to advise on and provide direct implementation support for secret shopper programs, customer research and journey mapping, and the development of customer experience (CX) plans; all with the goal of streamlining and identifying efficiencies within New York City services. To support agencies with the Customer Experience planning process, the Guidehouse team has developed a comprehensive CX Toolkit containing overview information on a variety of key customer experience research tactics such as journey mapping, secret shopping, time tax, and user testing, along with templates, quick reference guides, sample outputs, and links to external resources to bridge learning and application. On a parallel track, the Guidehouse team conducted individualized technical assistance with over 20 agencies related to their specific CX plan initiatives and supported MOE in strategic planning for how to build out CX work across the City in coming years. While building the CX governance framework mentioned above the Guidehouse team has also engaged directly with over 25 city agencies to implement secret shopping, journey mapping, and time tax methodologies to gather customer research to drive internal CX process improvements in the immediate term. This included doing City stakeholder interviews, direct customer surveys and research, in-person workshop observations, call listening, and secret shopping to build a detailed agency process map and customer journey map for the Department of Housing Preservation and Development Senior Citizen Rent Increase Exemption Program, the Department of Finance Rent Freeze Program, among others. The customer journey maps include time tax measurements and insights on the administrative burden faced by customers and are informing recommendations that Guidehouse is developing to help agencies reduce the challenges faced by their customers. The Guidehouse team is also delivering journey mapping training and conducting train-the-trainer sessions for multiple agencies that are creating CX initiatives to build agency staff capacity in sustaining these programs.

#### 4.1.5 New York City Housing Authority – Procurement Function Assessment

##### Description of Services/Scope of Work

As part of its organization-wide Transformation initiative, the New York City Housing Authority (NYCHA) sought to assess its procurement function to improve the way it does business internally with customer departments as well as externally with partner vendors. NYCHA engaged Guidehouse to assess its end-to-end procurement lifecycle to understand its current strengths and areas for improvement to support the development of a strategic plan forward. Guidehouse conducted interviews and shadowing sessions, reviewed internal documentation and City, State, and Federal regulations that impact procurement, and analyzed three years of contract spend data to assess the current state of NYCHA’s procurement function. The team then transitioned into the recommendations phase, using leading practices desk research and interviews to benchmark NYCHA against peer agencies and other housing authorities. Using these inputs, the team developed recommendations across three areas (structure and culture, internal efficiencies, and strategic sourcing and vendor management), along with an implementation roadmap to tactically sequence and prioritize its recommendations. To aid NYCHA’s procurement department in becoming a more strategic unit within NYCHA, the team developed a set of tailored, prioritized recommendations and an actionable implementation roadmap that can be integrated with NYCHA’s ongoing Transformation efforts. The team is now pursuing extension opportunities such as rewriting and redesigning NYCHA’s procurement policy manual and developing procurement process aids. If implemented successfully, the team’s strategic plan will contribute to key procurement outcomes, decreasing time-to-procure and the cost of procurement, increasing purchasing power, spend efficiencies, and regulatory compliance, and enhancing internal and external user experiences.

#### 4.1.6 Adams County Department of Human Services – Customer Journey Mapping

##### Description of Services/Scope of Work

The Adams County Human Services department (ACHS) sought Guidehouse’s support in understanding the customer journey and developing a roadmap for improving their experiences. To support ACHS in its improvements to customers’ experiences, Guidehouse analyzed hundreds of internal documents, conducted stakeholder interviews across twelve of ACHS’s divisions, observed more than one hundred calls at a call center, participated in 130 on-site customer interactions, and conducted numerous customer outreach interviews. After analyzing this wide-spread data, Guidehouse created six customer personas that represented 80% of ACHS’s customers, developed six journey maps to describe the experiences customers had, and provided data-driven analyses of the key findings from customer interactions. With each customer persona created, Guidehouse created a corresponding journey map showing the path a customer might take given their unique needs. Along with these tailored journey maps, Guidehouse conducted a deep dive into the case journey a customer is likely to experience. By better understanding customers’ unique experiences via journey maps, the Guidehouse team helped the Department increase customer engagement; eliminate ineffective touchpoints and duplicative requests; streamline service referrals to other departments and resources; and optimize outreach efforts.



#### 4.1.7 Port Authority of New York and New Jersey – Department of Tunnels, Bridges, and Terminals Customer Experience Strategy

##### Description of Services/Scope of Work

The Port Authority of New York and New Jersey (PANYNJ) hired Guidehouse to assist in the agency’s ambitious goal of providing “21st Century Customer Service” by developing a comprehensive customer experience strategy for the Department of Tunnels, Bridges and Terminals (TB&T). Guidehouse was brought in to assess the state of current customer experiences, identify leading practices, and develop recommendations on areas where TB&T could improve. The Guidehouse team began by developing a Leading Practices Report and Current State Assessment. The team conducted 26 discussions with PANYNJ staff and 8 leading practice interviews, examined TB&T’s Salesforce configuration and use, and mystery shopped Facilities and digital customer touchpoints. Using this information, as well as customer data, the team segmented TB&T’s customers and journey mapped their unique experiences through TB&T’s terminals, bridges, and tunnels. As the team moved into strategic recommendation development, it leveraged this knowledge to create actionable steps for organizational structure, feedback and outreach channels, data collection, use of Salesforce, and administration of TB&T’s customer survey. The team also held a visioning session with the TB&T team to develop a CX vision and goals. Finally, the team translated each recommendation into actionable steps, creating an Implementation Plan for each and an overarching Roadmap for the CX strategy. The team presented its Strategy Recommendations and Implementation Plan and adapted the materials to address the Department’s needs and support TB&T during the current COVID-19 pandemic. Overall, this project provided TB&T with a strategy and framework to understand and KPIs to measure progress towards its customer experience commitment. As well, the strategic recommendations can be used as a platform to support other PANYNJ departments with reaching the agency’s “21st Century Customer Service” goal.

#### 4.1.8 Metropolitan Transportation Authority – Fair Fares Project

##### Description of Services/Scope of Work

The MTA convened a panel of distinguished New Yorkers to take a deep dive into fare evasion. The goal is to hit the reset button on how we approach fare evasion at the MTA and across government. The panel’s mission is to find and promote solutions to this growing problem. It will be driven by the principles of fairness and citizenship and will focus on four areas: Education, Equity, Enforcement and Environment. The MTA engaged Guidehouse to lead fact development primarily on the Equity workstream, with limited responsibility on the Education and Environment workstreams. Our experience in customer journey mapping and community engagement with other New York City agencies and transit authorities across the country gave us a proven methodology to perform effective outreach and understand what is causing low participation in the Fair Fares program. We adopted a rapid project engagement with 5 key phases over the course of 12 weeks, where we established current fact base by analyzing registration and utilization data, conducted stakeholder interviews, focus group and post-focus group surveys, and developed representative customer personas to bring each customer segment “to life”. We then did benchmarking research, developed and evaluated options by taking cost, operational implications, impact and implantation difficulties into consideration.

#### 4.1.9 Metropolitan Transportation Authority – Contact Center Assessment

##### Description of Services/Scope of Work

With the goals of reducing overall costs and improving overall customer experiences, the Metropolitan Transportation Authority (MTA) hired Guidehouse to conduct an assessment of the MTA’s six public-facing contact centers and provide recommendations based on our firm’s review. The goal of our engagement focused on three main themes: Structure and People, Process and Performance, and Tools and Technology. To achieve the MTA’s Structure and People goals, Guidehouse analyzed ways to reduce staffing levels to meet demand while developing key performance indicators the MTA could continue to track moving forward. Second, our firm studied ways to invest in customer experience trainings and to introduce shared knowledge across all contact centers. For Process and Performance, Guidehouse assisted with the sourcing and development of self-service tools, the marketing and promotion of said self-service tools, and the establishment of KPIs and service-level agreements. Lastly, for Tools and Technology, this MTA engagement focused on investment of key contact center improvement tools. Guidehouse analyzed already ongoing external public initiatives the client could utilize for synergetic enhancement. At the conclusion of the engagement, based upon the review provided by Guidehouse, the MTA moved forward with our recommendations to have more centralized oversight of in-house contact centers and to merge Metro-North Railroad and Long Island Rail Road contact centers together.

#### 4.1.10 Housing Authority of the City of Los Angeles – Business Process Review

##### Description of Services/Scope of Work

The Housing Authority of the City of Los Angeles’ (HACLA) Section 8 Department engaged Guidehouse to improve internal processes and service delivery. HACLA has faced challenges in implementing effective change management and timely issuance of housing vouchers. As a result of these challenges, the voucher utilization rate with assisted housing programs is not high enough. Further, certain assisted housing programs are no longer receiving enough referrals from their partner agencies. Guidehouse was hired to help improve the operations of the Section 8 Department in a multi-phased engagement. In the first phase of our engagement, Guidehouse spent four months conducting 20+ stakeholder interviews, holding 20+ process mapping sessions with 30+ staff members, and conducting a value-add analysis on 500+ process steps. We developed three detailed and comprehensive process maps. We created 4 value stream maps including processing time, process lead time, wait time, % complete and accurate, and first pass yield metrics. We collected data and analyzed available data sets, calculated statistics for current processing times and error rates, and conducted a root cause analysis to identify key pain points and areas for opportunity across select program areas. During the next phase of our engagement, our team will continuously assess the processes handled across the Section 8 Department and identify additional opportunities to improve service offerings for HACLA’s customers, including 13k+ private landlords and Section 8 tenants. We will work hand-and-hand with staff and program leadership to implement and pilot proposed recommendations. Our efforts will be in alignment with HACLA’s internal initiatives to enhance regional housing security and LA City’s declared state of emergency on homelessness.

#### **4.1.11 United Way of Greater Philadelphia – Housing Strategy, Framework, and Solutions Design**

##### **Description of Services/Scope of Work**

United Way engaged Guidehouse to assist in producing a housing strategy framework for Philadelphia that can inform policy and practice, that includes financeable solutions for United Way to pursue, in conjunction with its partners. This process will assist United Way in building the knowledge base as a thought leader to take positions relative to housing solutions in the future. The goal of this engagement is to provide the groundwork toward one or more investible pilot programs. It is important that this engagement is not just a planning exercise, but an action-oriented process that engages key stakeholders and “sets the table” for meaningful and implementable efforts to follow. The 16-week engagement includes three components, Listening/Convening, Strategy Development, and Preliminary Solutions Design. This work will provide the basis for a later set of activities that can refine the proposed solutions, detail out the programs and processes involved with those solutions, develop an evaluation design process for each solution, and lay out an implementation roadmap.

#### **4.1.12 City of Jackson Department of Community Development – Housing Strategy and Policy Framework**

##### **Description of Services/Scope of Work**

Guidehouse was contracted by the City of Jackson's Department of Community Development and the newly formed Affordable Housing Development Board to develop an action-oriented housing needs assessment (HNA) that is being used to shape local policy and programs, and best utilize the City's State and Local Fiscal Recovery Funds. Our team collaborated with the Affordable Housing Development Board to develop a framework that synthesized existing data, reports, and current City programs and efforts, and engaged stakeholders to determine the strengths, challenges, and gaps in the housing landscape across all income bands. Guidehouse planned and conducted the HNA, which included engagement with local stakeholders, performed a current state analysis, forecasted the impacts of future population changes, developed housing targets, evaluated national best practices, and designed program solutions to address housing needs for the City.

#### **4.1.13 State of New York Governor’s Office of Storm Recovery – Housing and Transportation Damage Assessment**

##### **Description of Services/Scope of Work**

Following Superstorm Sandy, New York State faced the challenges of estimating its storm damage, as well as delivering federally appropriated funds to areas affected by the natural disaster. Guidehouse was initially engaged by the State to verify estimates of storm damage for inclusion in its request for Federal Supplemental Funding, and later to develop and execute a wide range of programs to deploy funds to constituents affected by Superstorm Sandy, Hurricane Irene, and Tropical Storm Lee. Throughout its partnership, Guidehouse supported the State with quality assurance reviews, program design, day-to-day operational support of programs, technology evaluations, and procurement process design. In its first workstream, Guidehouse reviewed estimates of damages covering housing, transportation, healthcare, the environment, and other areas and helped the State refine these numbers. Additionally, the team helped to facilitate conversations with the United States Department of Housing and Urban Development (HUD) and other agencies in which damage estimates were reviewed. In response to a new disaster response challenge, Guidehouse developed and executed programs to deploy funds effectively for the wide range of constituents affected by natural disasters. Guidehouse provided data-driven recommendations and insights on deployment of disaster recovery funds, while helping the State realize multi-million-dollar efficiencies. New York State built housing recovery programs that strive to provide timely delivery of funds to the State’s disaster-impacted constituents. Additionally, Guidehouse’s ability to respond to the State’s arising needs provided flexibility in deploying program funds quickly and effectively.

#### **4.1.14 New York City Department of Citywide Administrative Services – Customer Experience and Service Function**

##### **Description of Services/Scope of Work**

The NYC Department of Citywide Administrative Services (DCAS) engaged Guidehouse to help the agency in its goal of becoming a premier customer service organization. DCAS’ challenge is providing predictable, reliable, and quality service to its customers, given its wide-ranging, diverse service offerings, and myriad client and stakeholder base. To support DCAS as it strives to become a premier customer service agency, Guidehouse conducted a customer experience assessment and provided recommendations for improvement. To build the current state assessment, the team collected data through several means and analyzed interview and survey data to assess customer service quality, distill recurring themes, and identify opportunity areas to expand what works well and address what does not. Where previously there was no centralized, succinct inventory of the agency’s offerings, Guidehouse created a service catalogue that documented the nearly 175 services DCAS offers its external clients providing a solid starting point to creating public-facing documentation for its customers. In addition, the future state report developed provided tangible and practical actions for DCAS to take to enhance its customer service, such as identifying KPIs, setting up regular customer forums, and developing an employee engagement and recognition program. Guidehouse also developed a proposed roadmap to deploy these new customer-centric initiatives.

#### 4.1.15 City of Denver Office of the Mayor – Denver’s Road Home

##### Description of Services/Scope of Work

Guidehouse was engaged by the City and County of Denver-Mayor’s Office to conduct an organizational and strategy assessment of Denver’s Road Home (DRH) to assess the current state of the organization through the review of available reports and interviews internally and externally to align the goals and metrics to a larger city strategy on homelessness. Guidehouse was asked to assist the Mayor’s Office in further defining and clarifying the DRH strategy through preparation and facilitation assistance for a strategic planning discussion with key stakeholders. Guidehouse facilitated a strategic planning session with key stakeholders from public, private, and service provider backgrounds to develop a mission, vision, and goals for Denver’s Road Home. Guidehouse also created clear next steps for DRH, which included an organizational restructuring and an elevation to a cabinet position in the Mayor’s Office.

#### 4.1.16 Metropolitan Transportation Authority – Pension and HR Organizational Assessment

##### Description of Services/Scope of Work

The Metropolitan Transportation Authority Headquarters (MTA HQ) was experiencing inefficiencies, inaccuracies, and an overall decreased quality of customer service, due to insufficient staffing, an absence of clear process documentation, use of manual processes, and inadequate technology solutions. Guidehouse was engaged by MTA HQ to perform a comprehensive organizational assessment and make recommendations to enhance the efficiency of its human resources, technology landscape, and business processes. Guidehouse conducted an assessment across pension plans, defined benefits, human resources, compensation, policies and procedures, health benefits, and tax favored programs to understand pain points and opportunities for improvement. The current state evaluation involved interviewing stakeholders, conducting technology application inventories, and drafting 125 process diagrams, and led to the identification of over 50 pain points. Guidehouse developed future state recommendations across five key focus areas based on the identified pain points, and leading practices, and facilitated client working sessions. The team also developed a detailed roadmap with sequenced initiatives and a project management plan to successfully implement recommendations. Guidehouse’s recommendations included restructuring the Human Resources department; introducing new units for customer service, performance management, and special projects; launching standard operating procedures for processes; identifying key performance indicators and reporting templates; and proposing self-service and workflow management and case management tools to address processes and technology gaps. The MTA implemented many of the proposed recommendations, leading to more efficient processes and enhanced customer service quality. Other results included an improvement in communications across and within MTA departments, an increase in staff utilization and a decrease in employee turnover, and an enhancement in knowledge retention and management.

#### 4.1.17 City of San Jose – Customer Service Standards & Vision

##### Description of Services/Scope of Work

Guidehouse was engaged by the City of San Jose to understand and assess person-to-person customer service for residents and businesses across the City and assist in developing a comprehensive Customer Service Vision, a set of standards, and actionable recommendations for improvement. In order to provide these deliverables for the city, Guidehouse utilized both internal and external stakeholder engagements. Internally, our firm held departmental interviews to understand staff perspectives, reviewed all relevant documentations, and conducted journey research. Externally, Guidehouse interviewed customers, reviewed chat support interactions with customers, observed calls at a call center, and lastly, observed staff desk interactions. After completing the data collection and research phase of the project, Guidehouse provided numerous client deliverables. Based on internal and external stakeholder engagement, Guidehouse designed representative customer personas and data-driven journey maps. With these comprehensive representations of the customer experience, Guidehouse provided a new evidence-based vision and standards as a pathway forward along with future mapping and gap analyses for continued improvements.

#### 4.1.18 Covered California – Customer Journey Mapping

##### Description of Services/Scope of Work

Covered California is the state health benefit exchange for the State of California. The agency aims to reduce the number of uninsured individuals by creating an organized, transparent marketplace to purchase affordable, quality health care coverage and receive cost-sharing subsidies. One of Covered California's five strategic pillars is a positive consumer experience from initial enrollment to maintaining coverage. To help achieve this goal, Guidehouse was engaged to evaluate the consumer journey from the outside in, providing a set of personas and consumer journey maps to represent the pain points experienced by Covered California consumers. To accomplish this, the team analyzed documentation and data from across the agency, including past consumer experience research, analysis, and initiatives. This work also included stakeholder engagement with Covered California staff and their external partners (e.g., "Journey Facilitators" such as patient Navigators and agents) to gather insights on common pain points, understand consumer needs, and identify opportunities. The data-driven consumer segmentation used existing Covered California consumer data to identify consumer groups. The team developed user personas and journey maps, using quantitative and qualitative insights from analysis of datasets (e.g., Service Center call data) and interviews. The completed journey maps summarize the consumer experience, bringing together existing research and new insights, to describe the end-to-end consumer journey. With this journey mapping stage complete, the team developed a set of recommendations, taking into account the organization's in-flight projects and consumer experience initiatives. Collaboratively with Covered California leadership, the team created a roadmap to support Covered California in meeting their consumer experience goals. Based on these deliverables, Guidehouse was further engaged to continue consumer experience services for Covered California. In the current phase of the project, our firm is supporting Covered California by developing a priority set of consumer experience KPIs, while also designing and implementing a dynamic consumer experience Dashboard to manage overall Covered California performance.



#### 4.1.19 California Department of Motor Vehicles – Performance Optimization

##### Description of Services/Scope of Work

The California Department of Motor Vehicles (DMV) engaged Guidehouse in a performance optimization effort covering six areas: strategy, IT strategy, enterprise governance, organizational change management, performance management system implementation, and leadership development. The DMV sought to understand current pain points and opportunities to be more efficient, effective, and innovative across all six project areas, and eventually build the systems, processes, and structures to become a DMV of the future. To achieve this, Guidehouse interviewed deputy directors and branch managers across divisions to inform strategic planning and change management while also conducting a current state assessment and gap analysis of the system. Further data was collected by shadowing internal meetings, conducting visioning sessions with executive leadership, reviewing internal documents and reports, and researching current leading practices on peer agencies and corporations. After the comprehensive analysis phase completed, the Guidehouse team produced a suite of deliverables for the DMV which included a five-year agency-wide Enterprise Strategy consisting of mission, vision, goals, objectives, and initiatives. Guidehouse also delivered a robust Enterprise Governance model and designed an Organizational Change Management Program to help transform the DMV for future success. Testing of Guidehouse’s recommendations was conducted over a one-month, accelerated timeline to meet milestone goals. This involved testing off all major components, user interface, automations, data storage and back-end editing. Once concluded, the proposed solutions were implemented with Guidehouse’s support.

#### 4.1.20 Travis County Health and Human Services – COVID-19 Supportive Housing

##### Description of Services/Scope of Work

The Department of Health and Human Services of Travis County engaged Guidehouse to assist with the planning and implementing of the County’s multi-million-dollar COVID-19 recovery effort. In addition to assisting with recovery work, Guidehouse was also tasked with soliciting additional funds from the government. The needs of those impacted – including individuals and families who could not make mortgage or rent payments, businesses that were forced to close and the record number of unemployed individuals – were previously unimaginable. Those working on the recovery effort were driven by a sense of urgency, and an “all hands-on deck” attitude. During this time, members of our team worked with Travis County to support program development, evaluate expenses, evaluate communications with stakeholder groups, and develop governance processes aimed at sustaining recovery.

#### 4.1.21 Recovery Innovations International – Los Angeles County Crisis Response Evaluation

##### Description of Services/Scope of Work

Guidehouse helped Recovery Innovations (R I) International respond to Los Angeles County’s request for information to evaluate and improve their crisis response system. Our firm assessed recent R I International draft proposals for the LA County response and offered recommendations and revisions. Guidehouse assisted R I International with a review, assessment, and revision of their proposals and provided actionable recommendations and thoughtful revisions for them to implement in their procurement efforts to Los Angeles County. Guidehouse’s revisions and recommendations provided a response that offered an innovative approach and highlighted recent trends and developments in the market, as well as in health equity and DEI practice. In addition, our review emphasized a responsiveness to the unique needs of LA County, as well as differences that exist within geographic areas of the county. There were numerous deliverables that Guidehouse provided with the recommendations above. These included the following: revised proposals with a strengthened approach to health equity and community impact measurement, detailed analyses of zip code data and trends regarding inequities and mobile crisis programs, a projection of an impact analyses for planned interventions, a framework and strategy for ongoing impact analyses, and proposed measures and implementation strategies that would support continuous quality improvement related to community impact based upon crisis service updates.



## 4.2 Example Work Products

### 4.2.1 Customer Research Materials

#### *Human Services Customer Interview Guide*

**[Agency] Customer Journey Mapping**  
Interview Guide – General

Meeting / Interview Details	
Meeting / Interview	
Date / Time	
Attendees	

**[Agency]’s Customer Vision**  
*We would like to start with an understanding of your overall vision for customer experience.*

1. We heard from one of our first conversations that one of your biggest goals is to move from being focused on regulatory requirements to meeting customer needs holistically. Are there additional customer experience goals we should be aware of?
  - a. How have these goals evolved over time?
  - b. How does the [Department] fit within [Agency]? How does this impact individual department vs. overall [Agency] goals?
  - c. How do Departments differ in customer experience goals / priorities?
2. How are aspects of the customer experience divided across Departments (e.g., intake, customer support)?
3. What is your ideal, future state vision for [Agency]’s customers?

**Customer Journey – Key Stages**  
*Now, we are hoping to understand the key stages that a customer might experience with [Agency].*

1. Do you have key customer journey stages that are currently used for research? If not:
  - a. Could you describe a “typical” end-to-end customer journey of someone that uses one [Agency] service?
  - b. Could you describe a “typical” end-to-end customer journey of someone that uses multiple [Agency] services?
  - c. How do these journeys differ? Are there other journey types we should know about (e.g., mandated vs voluntary, differences between Main Hub and other locations, in-person vs virtual assistance)?
    - i. How has the pandemic changed the customer experience? Are there changes that will likely become permanent?
2. What are the key external partners / stakeholders that impact the customer journey?
3. What are the most important requirements / policies / regulations that impact your services?

**Key Customer Populations**  
*We would like to understand the key customer populations that [Agency] focuses on.*

1. Are there key customer populations that [Agency] is interested in (e.g., language, type of services used, household size)? How do their journeys differ?
2. Are there historically excluded populations or especially vulnerable populations that the Department is focused on?
3. How does the Department define customers? Do you consider your customers to be individuals, or does this definition expand to business / other organizations?
  - a. How does this definition differ based on Departments / service areas?

*Agency Post-Service Customer Interview Guide*

**[Department] Customer Interview Guide**

**Script**

Hi, I am conducting interviews on behalf of the [Agency] to better understand your experience with receiving project approval and work permits through the [Agency]. We plan to use the information you provide to improve [State Residents]'s experience with this process. Would you be willing to answer some questions? It should take a few minutes.

**Interview Questions**

**Context**

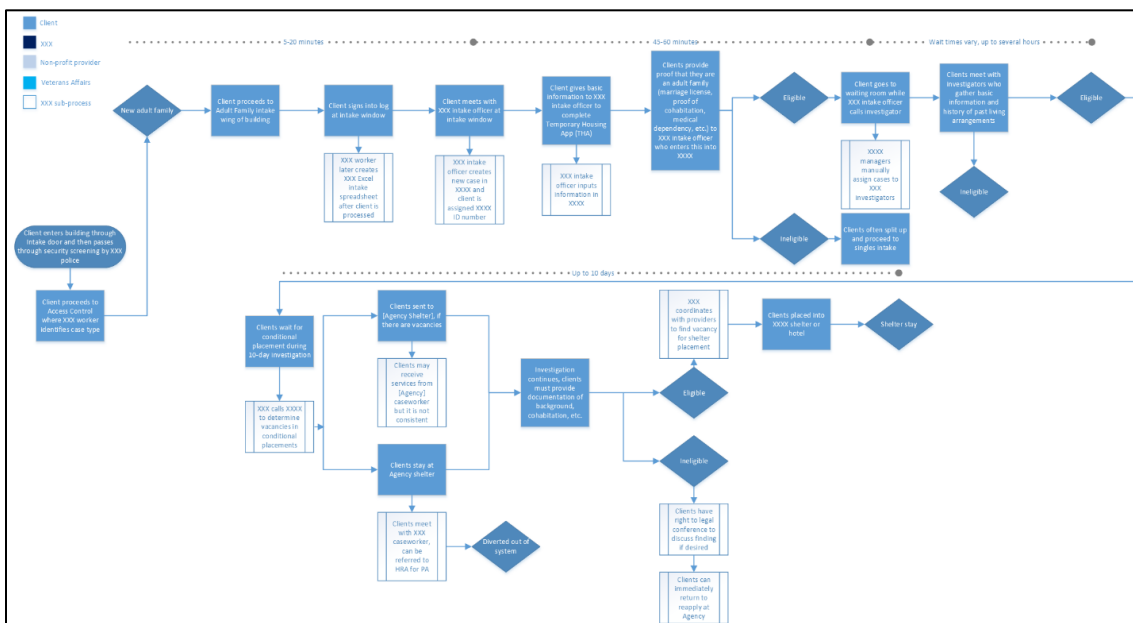
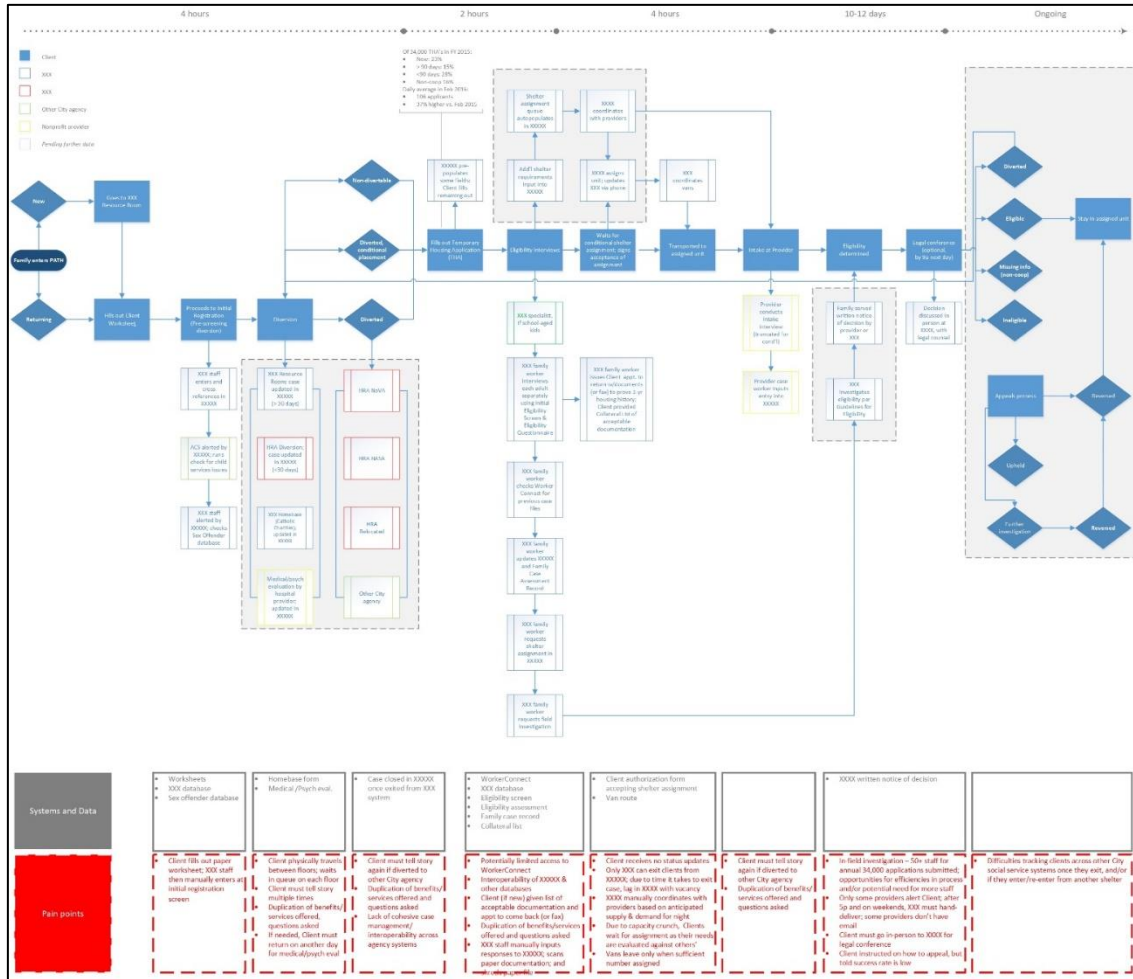
1. We were referred to you by [name], the Owner of [address] who you assisted on a project submitted to [DEPARTMENT]. Was this your first time submitting a project and applying for a work permit with [DEPARTMENT], or did you have prior experience with this process? *Answer options: First time, prior experience*

**Journey Feedback**

1. Prior to submitting this project, what information did you have about the process? Where did you get this info? *Answer options: The [DEPARTMENT] (webpage, phone call, office visit), [AGENCY], YouTube, Google, Other \_\_\_\_\_*
2. Please describe the process of submitting this project to [DEPARTMENT]:
  - a. Was any part of the process easier or harder than you thought?
  - b. Did you have all the information you needed? *Answer options: Yes / No*
  - c. Did you need any help (e.g., from other filing reps, general contractors, or a [DEPARTMENT] representative)? *Answer options: Yes / No* What did you need help with?
  - d. What role, if any, did the owner have in this process?
3. Approximately how long after the first iteration of the plans and permit application were submitted did it take for you to hear back from [DEPARTMENT]?
4. Approximately how long after the alteration plans and permit application were submitted for the first time did it take for them to be approved?
5. Were you able to check on the status of the alteration plans and permit application? *Answer options: Yes / No. How easy or difficult was it to access the status? (1=very easy and 5=very difficult)?*
6. How long did you think it would take to get the project approved and get a work permit? How long did it actually take you?
  - a. Were you able to finish it in one sitting? *Answer options: Yes / No*
  - b. If not, what stopped you from finishing (e.g., too long, needed to find a document, technical issue)?
7. Were the alterations plans and permit application disapproved?
  - a. If yes, how many times were they disapproved?
  - b. If you were disapproved, did you understand why? *Answer options: Yes / No*
8. Were the alterations plans and permit application resubmitted?
  - a. If so, to your knowledge, how many times were they resubmitted?
  - b. Were the comments for resubmission clear? *Answer options: Yes / No*
  - c. How long did it take to prepare documents for resubmission?

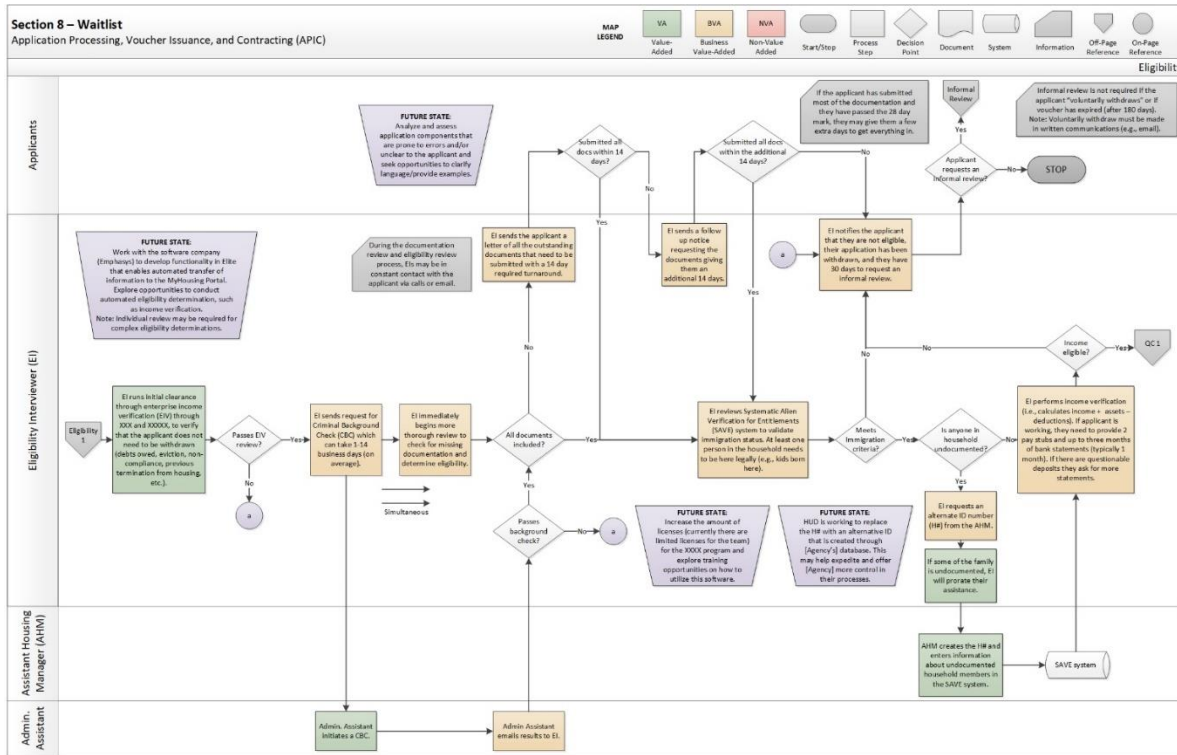
4.2.2 Process Maps

Housing Placements Process Maps

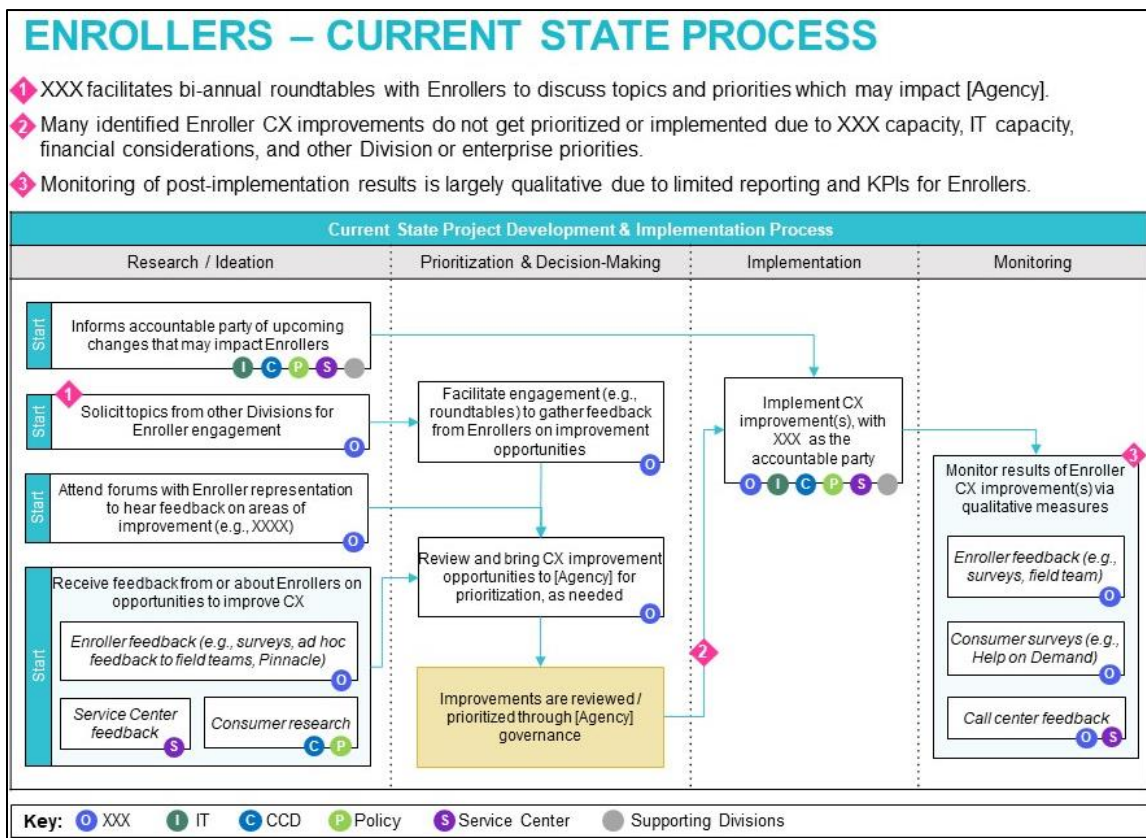


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Housing Application Process Map



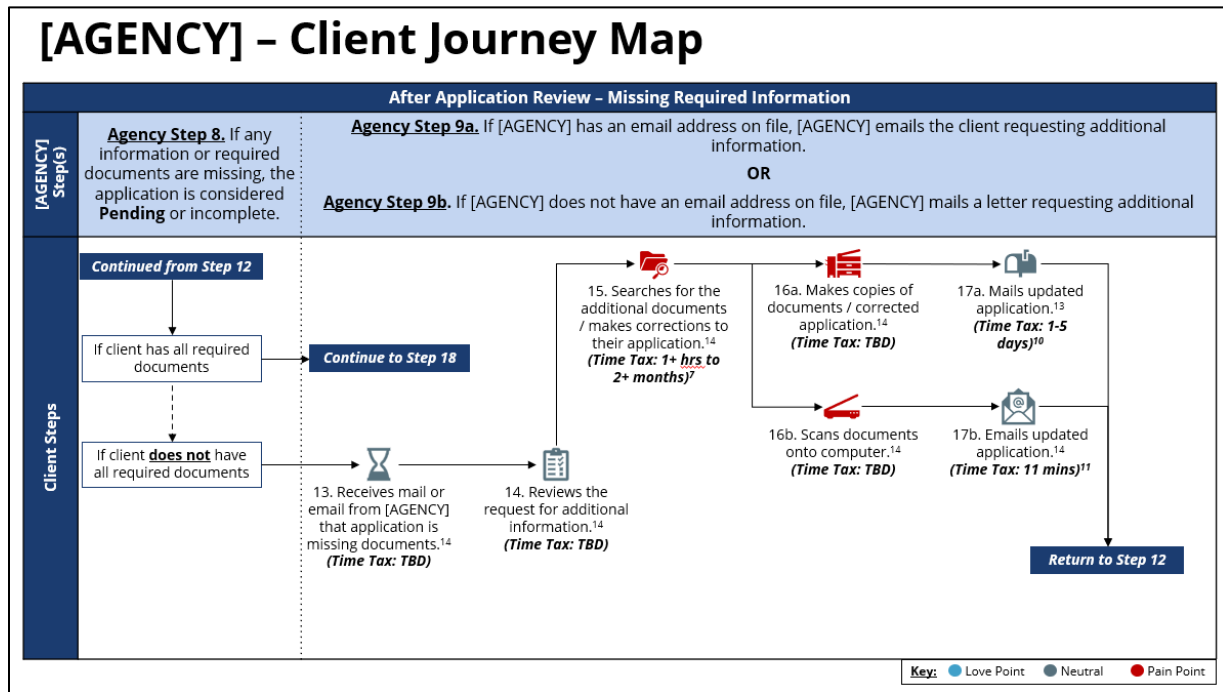
Current State Process Map for Community-Based Program Enrollment Partner



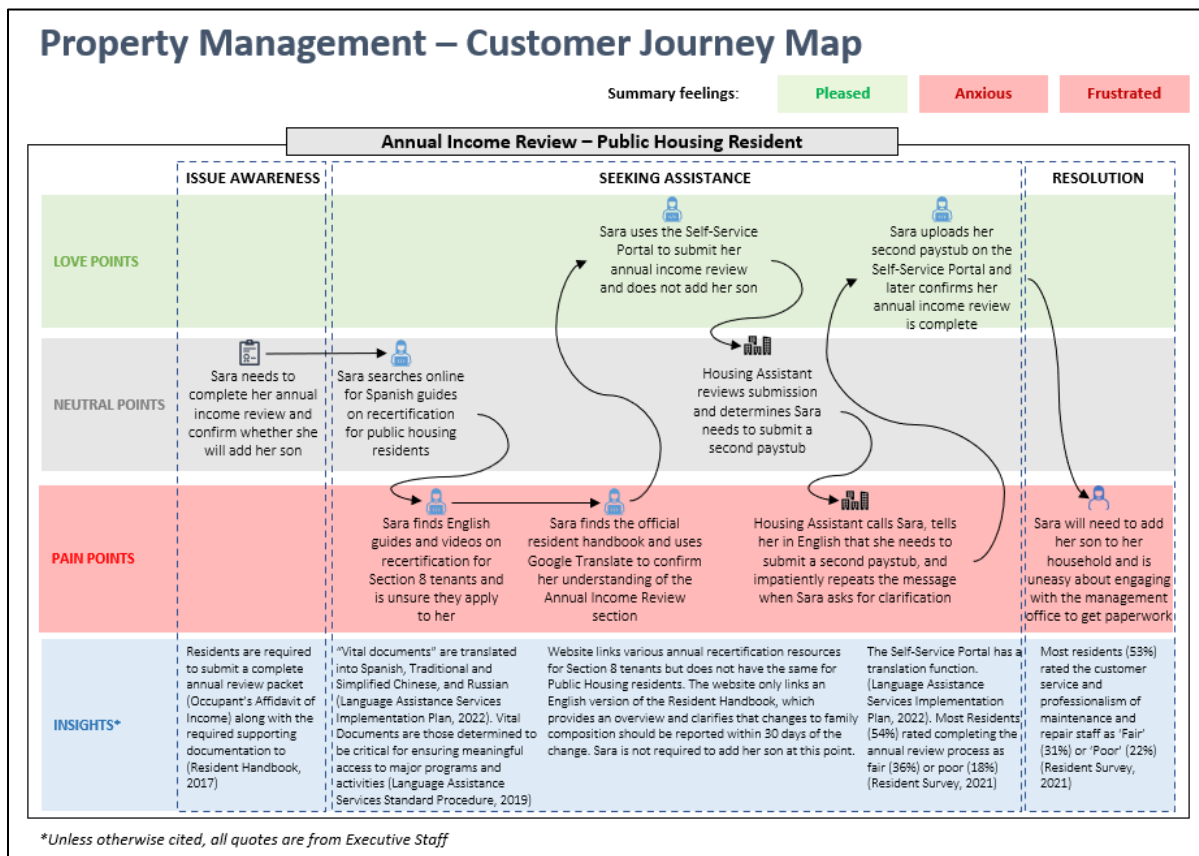


### 4.2.3 Customer Journey Maps

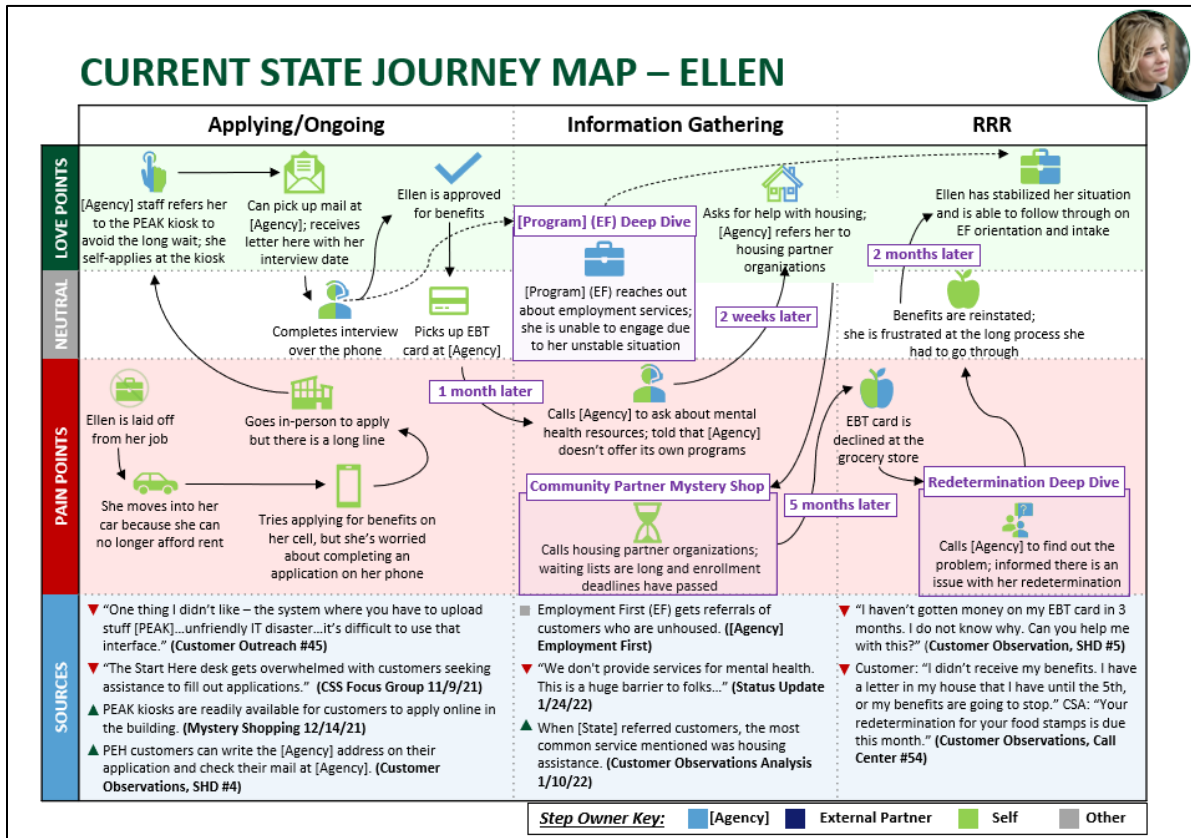
#### Customer Journey Map for Rent Credit Program, with Time Tax Measurements



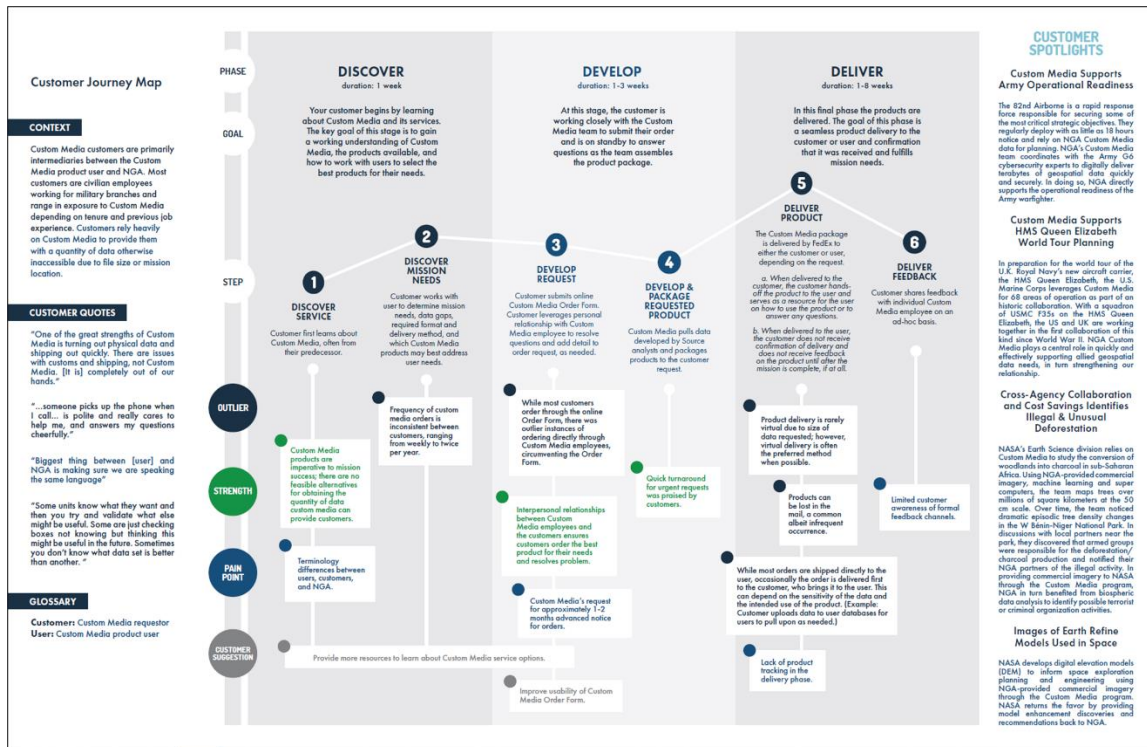
#### Customer Journey Map for Public Housing Resident



Unhoused Persona – Human Services Customer Journey Map













Federal Agency Customer Journey Map



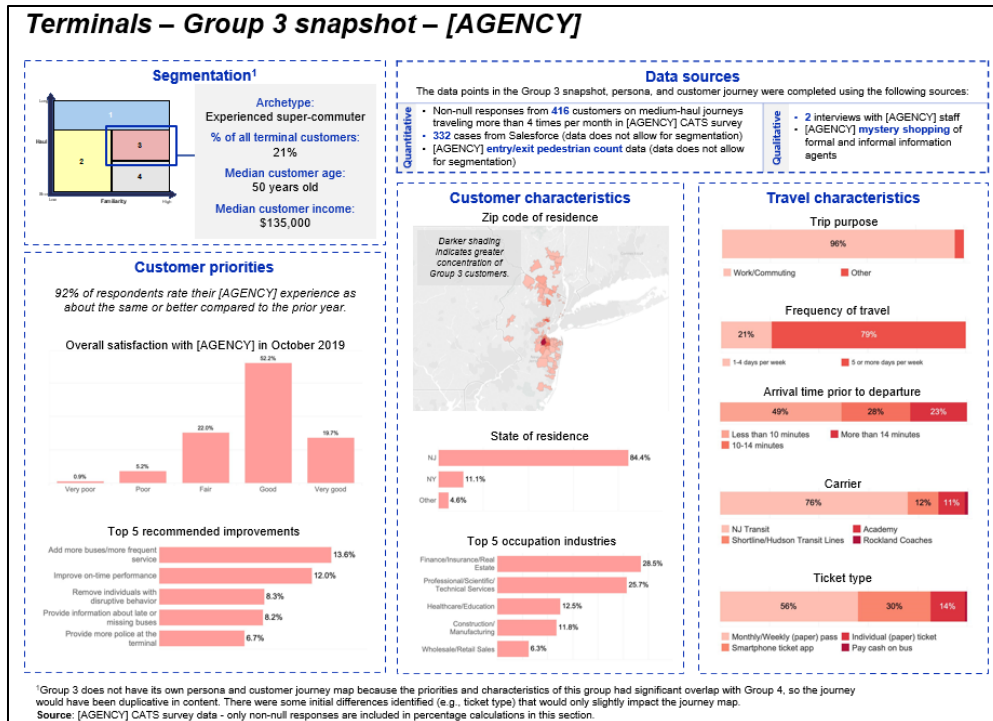


### 4.2.4 Current State & Gap Analyses

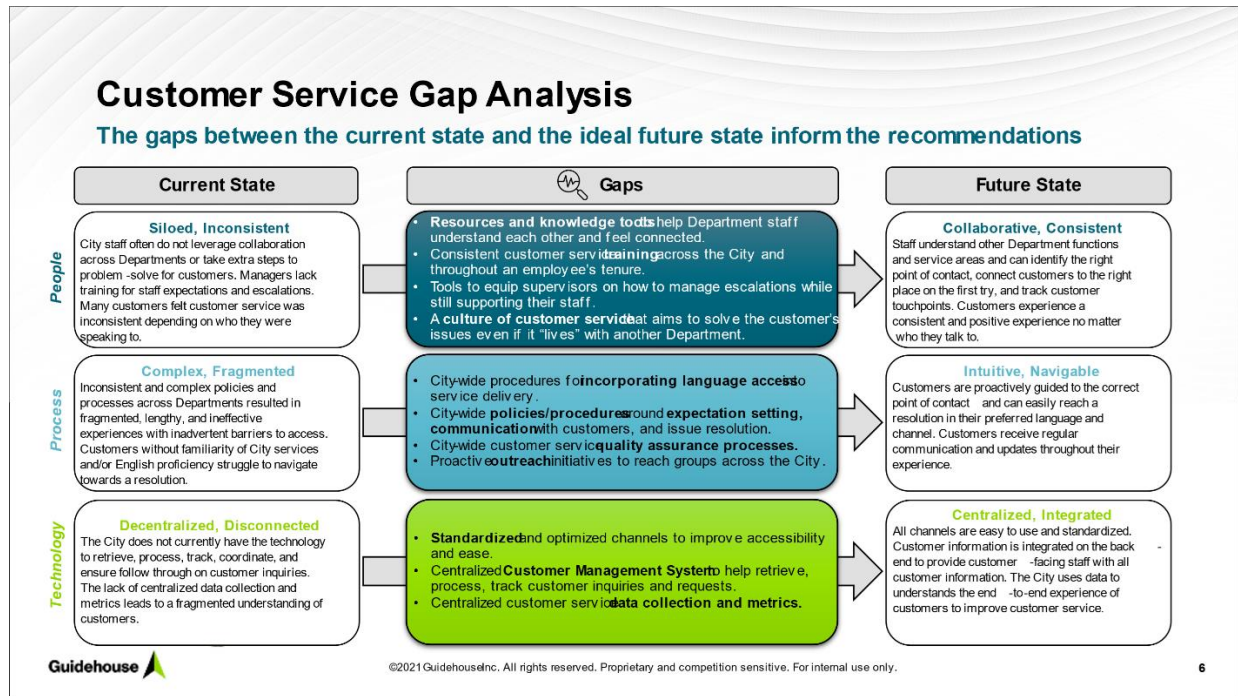
#### Customer Experience Gap Analysis

Executive Summary – Customer Experience Gap Analysis			
	CURRENT STATE	GAPS	FUTURE STATE
Culture	<b>Undefined Approach</b> The organizational approach to customer experience is undefined and is characterized by an inconsistent service and a transactional relationship between customers and staff.	<ul style="list-style-type: none"> <li>Lacks the prioritization of the satisfactory CX in all staff meetings and presentations.</li> <li>Lacks the requirement of 'customer centric behavior' while hiring new staff or while writing job description.</li> </ul>	 Polite  Consistent  Coordinated
	<b>Fragmented Collection</b> Agency does collect some CX data, but there is not an agreed upon set of metrics that can be used to enhance customer experience organization-wide.	<ul style="list-style-type: none"> <li>Lacks well-rounded collection of CX data from multitude of sources.</li> <li>Conducts survey but lacks effective CX data utilization into decision making.</li> <li>Lacks CX in performance metrics and goals.</li> <li>Lacks formal CX and communication style trainings.</li> </ul>	 Data driven decision-making  Capturing data from all sources  CX-centered performance
Data, KPI	<b>Decentralized Service</b> The decentralized organizational structure complicates the delivery of service for some core customer-facing transactions.	<ul style="list-style-type: none"> <li>Lacks focused CX efforts that translates into all agency-wide workstreams, strategies, operations, PR, and C-suite.</li> <li>Lacks capacity and consistency in handling large customer call volume and service delivery.</li> </ul>	 Collaborative  Integrated
	<b>Scattered Distribution</b> Key messages are communicated inconsistently, through ineffective channels, and do not always meet the diverse customer needs.	<ul style="list-style-type: none"> <li>Lacks a centralized platform consisting of all CX-related information, contacts, and methods resulting in customer confusion.</li> <li>Lacks an agency-wide platform to regularly discuss customer concerns, strategies, and best practices.</li> </ul>	 Accountability  Streamlined
Structure			
Communication			

#### Transit Agency Current State Analysis



City-Wide Customer Service Gap Analysis



City Agency Current State Assessment

### Executive Summary – Current State Assessment

	What is working well?	Where is there room for improvement?
<b>Does [Agency] provide clear &amp; flexible service offerings?</b>	<ul style="list-style-type: none"> <li><b>Knowledge:</b> [Agency] staff are professional and have high levels of institutional and technical knowledge, which customers rely on across staff</li> <li><b>Process improvements:</b> Customers noted that processes have improved over the past few years; Fleet has introduced additional backdrop contracts</li> </ul>	<ul style="list-style-type: none"> <li><b>Service documentation:</b> staff can create comprehensive service offering documentation (SOPs), and communicate this to increase awareness and process knowledge</li> <li><b>Practical application:</b> [Agency] can better support managing Mayoral policies that conflict with agency operations (e.g., fleet reduction vs. [Agency] new hire vehicles)</li> </ul>
<b>Does [Agency] act as a partner &amp; collaborate?</b>	<ul style="list-style-type: none"> <li><b>Customer service focus:</b> 88% of [Agency] staff indicated they know how customer service fits in with [Agency] mission, and leadership outlined customer service goals at the retreat</li> <li><b>Innovation:</b> Customers appreciate [Agency] expertise that has improved operations and performance outcomes (e.g., Citywide hiring pools, recognition awards)</li> </ul>	<ul style="list-style-type: none"> <li><b>Customer centricity:</b> Customers note [Agency] challenging role yet want to feel like a 'customer' - "not doing us a favor", "if you can't answer my question, let me know who can"</li> <li><b>X-staff working groups:</b> Most customers are cross staff, but each often acts as its own silo; x-staff working groups can be used to discuss shared challenges and solutions</li> </ul>
<b>Is [Agency] transparent &amp; do they proactively communicate?</b>	<ul style="list-style-type: none"> <li><b>Customer feedback:</b> Some staff (e.g., Facilities) reach out to customers for feedback through assessments, in-person meetings, and surveys to make improvements</li> <li><b>In-person meetings:</b> Customers noted the importance of in-person meetings to share new [Agency] offerings and facilitate cross-agency collaboration</li> </ul>	<ul style="list-style-type: none"> <li><b>Proactive communications:</b> Customers were unaware of the restructuring, employee roles, and staff responsibilities; customers requested memos and organizational charts</li> <li><b>Service request status:</b> Multiple customers (especially Facilities) noted that service requests "get staff in space" and would like to have visibility into status and turnaround</li> </ul>
<b>Does [Agency] provide real time data &amp; analytics tools?</b>	<ul style="list-style-type: none"> <li><b>Data &amp; reporting:</b> Customers noted the helpfulness of data that some staff collect and analyze (e.g., demand response) that inform strategic decision making</li> <li><b>New technology:</b> [Agency] has prioritized the development and implementation of technological tools to increase efficiency and enhance the customer experience</li> </ul>	<ul style="list-style-type: none"> <li><b>Technology:</b> Minor enhancements can be made to select systems (Portal) to improve functionality and larger changes are needed to [System] to increase adoption</li> <li><b>Annual review:</b> Reports can highlight [Agency] value-add and quantify the work it does for each agency (service volume, cost savings, projects managed, etc.)</li> </ul>

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### 4.2.5 Recommendations

#### Internal Culture Change and Training Recommendation

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## Theme 1. Culture & Training

Recommendation 1.2: Invest in customer service-related support and professional development opportunities (long term)

Recommendation Detail (continued)

Note: The development plan should be leveraged to determine specific curriculum / training needs per staff level

Customer-Facing Staff	<b>Customer Service 101</b> Reviewing the [Agency's] Vision and Standards; establishing customer service expectations, roles, and responsibilities, treating all customers with empathy; developing a solution-oriented mindset.	<b>Tools and Resources</b> Utilizing the FAQ page; how to search for contact information and use organizational charts.	<b>Inter-Departmental Awareness</b> Learning about service areas provided in other Depts; how to transfer customers to the correct location.	<b>Language Access</b> How to support customers who speak other languages; available resources such as translators.
Supervisors & Managers		<b>Empowering Staff to Succeed</b> Professional development, support and incentives for staff to go above-and-beyond.	<b>External Partnerships</b> How to strengthen relationships with the [Agency's] external partners; conducting outreach with NGOs.	<b>Supporting Staff Mental Health</b> Supporting staff when faced with difficult customers; creating an empathetic, equitable workplace.
All Staff				

Additional Information (continued)

Measures of Success	Best Practice
<ul style="list-style-type: none"> <li>% of employees that complete trainings by target dates.</li> <li>% of courses offered that employees enroll in vs. complete.</li> <li>Internal employee satisfaction (survey).</li> <li># of clicks to internal FAQ pages.</li> <li>Time spent on internal FAQ pages.</li> <li>Duration of customer resolution.</li> </ul>	<p>In 2011, Denver's Mayor created the Denver Peak Academy, a process improvement team that trains and collaborates with government employees to improve the customer and employee experience through trainings and process innovation workshops. Peak works with the frontline staff in each Department to best utilize the tools and talent they already possess to improve their processes without additional funding.</p>

Guidehouse

#### Governance, Project Management, and Communications Recommendation

### Implementation Roadmap: Implementation activities overview

[Agency] should enact strategic governance structures, project management functions, communications strategies, and change management tools to successfully implement these recommendations

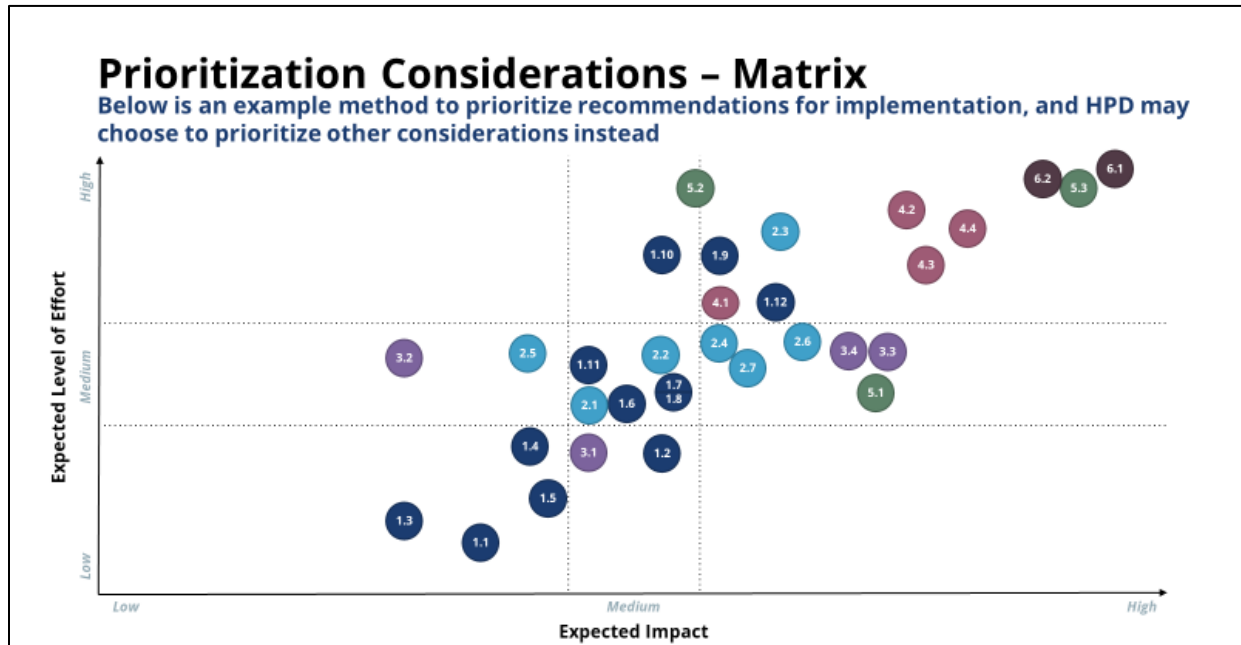
<div style="background-color: #d9d9d9; padding: 5px; margin-bottom: 5px;">                  Governance structure and dedicated project management function             </div> <ul style="list-style-type: none"> <li><b>Governance structure:</b> [Agency] should establish an Innovation Team in order to <b>implement</b> recommendations, <b>test</b> initiatives, and <b>regularly review</b> [Agency's] L&amp;D function</li> <li><b>Project management:</b> [Agency] should designate a project manager (PM) to <b>oversee</b> implementation and the Innovation Team working groups. The PM will be responsible for <b>managing program execution</b> and ensuring that the initiatives meet time and quality expectations</li> </ul>	<div style="background-color: #d9d9d9; padding: 5px; margin-bottom: 5px;">                  Strategic communication &amp; change management             </div> <ul style="list-style-type: none"> <li><b>Strategic communication:</b> Many stakeholders took part in this study and will want to know the outcome and status as the program progresses. The project management team will need to <b>continually communicate</b> with staff to <b>maintain momentum</b> from the study, sharing regular, strategic messages with select audiences</li> <li><b>Change management:</b> A concerted change management effort is instrumental to institutionalizing the recommendations. [Agency] should <b>assess stakeholder needs</b> and enlist a <b>dedicated team</b> to increase <b>buy-in</b> and act as a resource to provide <b>continuous communication</b></li> </ul>
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InitiatePlanExecuteMonitorClose

<ul style="list-style-type: none"> <li>Finalize high-level implementation plan</li> <li>Identify project manager</li> <li>Develop Steering Committee and Innovation Team charter to include scope, objectives, roles, responsibilities, etc.</li> <li>Identify key stakeholders to support implementation</li> </ul>	<ul style="list-style-type: none"> <li>Develop detailed implementation plan with dependencies, risks, etc.</li> <li>Forecast project budget and develop tracking tool</li> <li>Create communication and change management plans</li> <li>Determine success criteria for each recommendation</li> </ul>	<ul style="list-style-type: none"> <li>Establish cross-Divisional project teams (Innovation Team working groups) to support and help drive implementation</li> <li>Manage all components of the program (e.g., status, meetings, deliverables, etc.)</li> <li>Communicate progress to stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Regularly review progress against success criteria and <b>make adjustments</b> as necessary</li> <li>Monitor impact of change and use change agents to collect and share key information</li> </ul>	<ul style="list-style-type: none"> <li>Communicate improvement results [Agency]-wide</li> <li>Conduct a formal review of implementation (i.e., after-action review) and document lessons learned to support future programs</li> </ul>
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Recommendations Prioritization Matrix



Process Optimization Recommendation – Leading Practice

## Leading Practice: Performance-Based Prequalification

... ..

This tool will allow [Agency] to integrate contractor's past performance on Department contracts into their prequalification to yield a modified bidding capacity score that incentivizes high-quality performance.

### Description

An [EHWA-commissioned study](#)<sup>1</sup> proposed a quantitative, performance-based prequalification system. It evaluates contractors on **administrative**, **performance**, and **project-specific** (i.e., technical qualifications) factors. It incorporates elements of systems used in Florida, Michigan, Oklahoma, Utah, Virginia, and Washington – the [Agency] that reported improvements in the surveys on the previous slide.

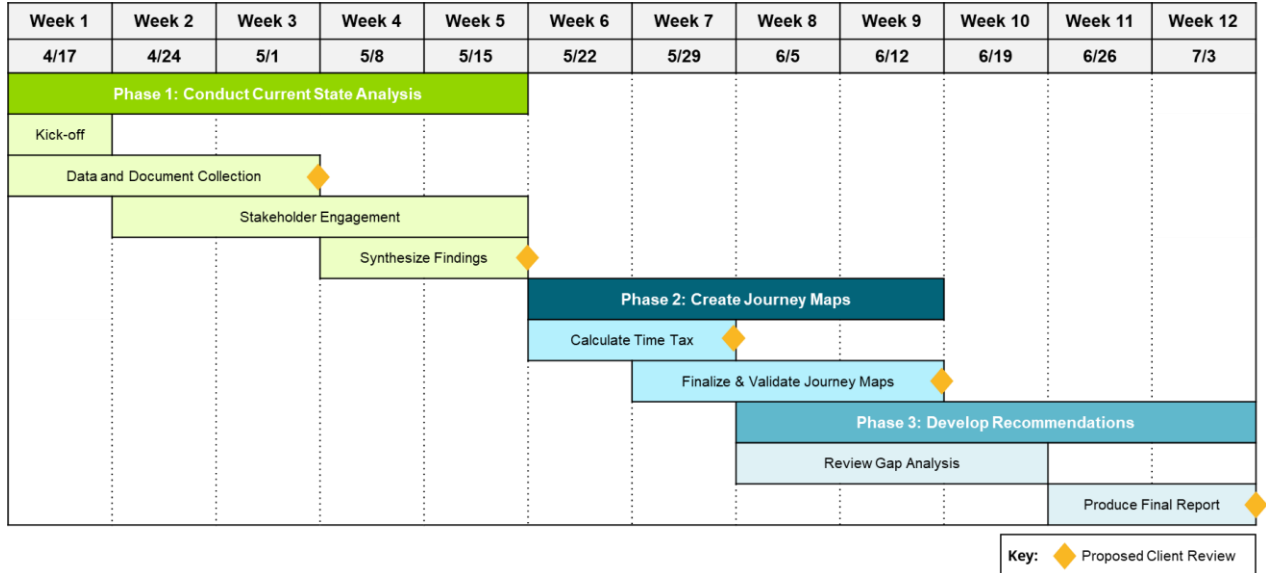
*Applied to [Agency], these practices may yield:*

- Alignment of contractor performance evaluation with project objectives
- High-performing contractors being rewarded
- Low-performers encouraged to improve

*Image Source: Guidehouse recreation of an excerpted framework from the "Performance-Based Contractor Prequalification as an Alternative to Performance Bonds" Study*

## 5. Proposed Project Plan

See the proposed timeline for the homeless housing placement evaluation below.





## 6. Engagement Letter / Contract

[Date]

[Full Name of Client Company]

Address

City, State Zip

Attn: Name, Title]

**Re: Guidehouse Inc. Master Consulting Services Agreement**

Dear [Name]:

This Master Consulting Services Agreement, together with the attached Appendices (“Agreement”), confirms the retention of **Guidehouse Inc. (“Guidehouse”)** effective as of [Date] (“Effective Date”) by [Insert Full Name of Client] (“Client”) to perform the services described herein.

### Scope and Delivery of Services

Services under this Agreement are subject to the Terms and Conditions in the attached Appendix A.

Guidehouse will, from time to time, provide consulting and advisory, as more fully described in a Statement of Work in the form of set forth in Appendix B (“SOW”) (collectively the “Services”).

Either party or their respective Affiliate (as defined below) may execute SOW(s) under this Agreement; provided however that the parent of such Affiliate will remain liable for the Affiliate’s failure to fulfill its obligations or adhere to the provisions of this Agreement, which provisions will be binding on the Affiliate that executes the SOW. For purposes hereof, the term “Affiliate” shall mean any entity that controls, is controlled by or under common control with Guidehouse or Client.

This Agreement is intended to serve as the framework for entering into separate SOWs. The SOWs entered into under this Agreement shall be: (a) executed by authorized individuals on behalf of each of the parties, and (b) incorporated into this Agreement as sequentially numbered SOWs. Unless otherwise agreed by the parties, all SOWs that are entered into under this Agreement shall be governed by the terms of this Agreement and are hereby made part of, and incorporated into, this Agreement. In the event of a conflict between this Agreement and a SOW, the terms of this Agreement shall prevail, unless the SOW expressly references the specific provision in this Agreement to be modified by the SOW. This Agreement shall not govern engagements related to expert services in litigation or other legal proceedings and a separate agreement for such services will be required. To the extent the term of an SOW extends beyond the termination of this Agreement, the terms of this Agreement shall apply to such SOW until expiration of such SOW.



### Fees and Expenses

The details of fees and expenses for the Services under this Agreement are set forth in the applicable SOW. Independent contractors or subcontractors may be utilized from time to time, at the applicable rates set forth in the applicable SOW. Client will be solely responsible for all financial obligations to Guidehouse in connection with this Agreement.

Guidehouse will invoice on a monthly basis. Related expenses will be invoiced monthly at cost with no mark-up. Actual cost of related expenses will be charged, including travel and transportation expenses, such as mileage (payable at the standard IRS rate), tolls, parking, airfare, hotel accommodations and meals as well as a Research Data and Technology Fee equal to five percent (5%) of fees under the applicable SOW, which covers Guidehouse's cost related to outside research and data subscriptions, software licenses, analytic tools, information security, data storage and technology connectivity. Guidehouse invoices are due upon receipt, and payment of professional fees and expenses is expected within thirty (30) days of the invoice date. Any objection to the invoice must be made within sixty (60) days after the date of the invoice; lack of timely objection to an invoice shall evidence Client's agreement to all invoiced amounts. A late charge of one percent (1%) per month will accrue on undisputed amounts not paid within sixty (60) days of the date of the invoice. If payment on invoices is past due more than sixty (60) days, Guidehouse reserves the right to terminate the Agreement or the applicable SOW or suspend the Services until payment is received. Guidehouse reserves the right to require payment of outstanding fees and expenses prior to the performance of any of the Services or the delivery of any work product. All costs of collection of amounts due and owing hereunder shall be paid by Client.

From time to time, Guidehouse may give Client an estimate of fees and expenses in the applicable SOW. Such estimates are subject to many unknown or uncontrollable variables. As such, they are only intended as approximate projections at a particular point in time. They may change as Guidehouse moves forward with the Services under the applicable SOW and are not intended to be an agreed upon fixed fee amount.

### Retainer

If the parties agree to a retainer, the retainer and any related requirements for that retainer will be described in the applicable SOW. If a retainer is agreed upon by the parties in the applicable SOW, Client hereby grants Guidehouse a security interest in and lien on the retainer, which shall secure all monies hereafter owing to Guidehouse by Client and agrees that the retainer can be applied by Guidehouse as it deems appropriate.

### Sales Tax

Client is responsible for paying any local, state or federal sales, use or ad valorem tax that might be assessed on our Services. Guidehouse will pay any local, state or federal income taxes relating to our Services.

### Term

The term of this Agreement shall commence as of the Effective Date and shall continue thereafter until termination of this Agreement as set forth in Appendix A, Section 7 (Termination).

Entire Agreement

This Agreement and the Appendices attached hereto and incorporated herein by reference, constitute the entire agreement between Guidehouse, on one side, and Client on the other side, regarding the terms of the Agreement. In the event Client requires Guidehouse to execute a purchase order or other Client documentation in order to receive payment for Services, the terms and conditions contained in such purchase order or documentation shall be null and void and shall not govern the terms of the Agreement. This Agreement is entered into without reliance on any promise or representation, written or oral, other than those expressly contained herein and supersedes any other such promises or representations. This Agreement can only be modified by a written agreement signed by duly authorized representatives of each party.

[Signature Page Follows]

If Client wishes to engage Guidehouse as outlined in this Agreement please sign in the space provided below and return an executed original to **[Named PARTNER ONLY]**.

Very truly yours,  
Guidehouse Inc.

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

\_\_\_\_\_ Date

Agreed to and Accepted by:

**[Insert Full Name of Client]**

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

Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

## APPENDIX A

### TERMS AND CONDITIONS

1. **Access:** Client agrees to provide Guidehouse with timely access to information, locations and personnel reasonably necessary for the performance of the Services.
2. **Client and Third Party Work Product:** The information provided by Client to Guidehouse shall be considered “as is” and Guidehouse will not validate or confirm the accuracy of the data and information provided. It is further understood that Guidehouse may be reviewing work product prepared by parties other than Guidehouse on behalf of Client, and accordingly, Client agrees to hold harmless and indemnify Guidehouse for any and all claims, damages, demands, liability and costs (including attorney fees as incurred) arising from negligent acts, errors and omissions of the parties who prepared such work product.
3. **Preliminary Findings and Draft Reports:** The preparation of Guidehouse work product is an evolving process during which Guidehouse analysis is focused and refined as research and document review proceeds and as information emerges. Preliminary conclusions, superseded drafts, notations, analyses, work lists, and irrelevant data are not a part of, and will not be recorded in, the final work product. Such documents may be appropriately discarded on a routine basis as work tasks are completed. Of course, circumstances may arise that require the retention of such drafts or other interim documents, including but not limited to subpoenas and court orders. Guidehouse understands that Client will provide it with any instructions regarding document retention or document production procedures that Client expects Guidehouse to follow.
4. **Consulting Services Disclaimer:** Guidehouse will not audit any financial statements or performing any attest procedures in the course of performing the Services under this

Agreement. Guidehouse's Services are not designed, nor should they be relied upon, to disclose internal weaknesses in internal controls, financial statement errors, irregularities, illegal acts or disclosure deficiencies. Guidehouse is not a professional accounting firm and does not practice accounting. Guidehouse's Services will not include legal, engineering or architectural advice or services.

5. ***Independent Contractor:*** It is understood and agreed that Guidehouse will for all purposes be an independent contractor, will not hold itself out as representing or acting in any manner for Client, and neither Guidehouse nor Client will have any authority to bind the other party to any contract or in any other manner. Guidehouse and Client do not intend to create a joint employer relationship, and Guidehouse and Client each represent that it is the sole employer of its employees. Guidehouse shall not and does not have the right to control Client's employees' essential terms and conditions of employment, including hiring its employees, determining their wages and benefits, or assigning, scheduling, training, disciplining, or terminating its employees.
6. ***Standard of Care and Performance:*** Guidehouse agrees that the Services provided for herein will be performed in a professional manner in accordance with recognized professional consulting standards for similar services and that qualified personnel will be assigned for that purpose. In providing the Services, Guidehouse and its personnel shall exercise reasonable care. Guidehouse cannot guarantee or assure the achievement of any particular performance objective, nor can Guidehouse guarantee or assure any particular outcome for Client or any other person as a result of this Agreement or the performance of the Services.

If, during the performance of these Services or within one year following completion of the Agreement, such Services will prove to be faulty or defective by reason of a failure to meet such standards, Guidehouse agrees that upon prompt written notification from Client prior to the expiration of the one-year period following the completion of the Agreement of any such fault or defect, such faulty portion of the Services will be redone at no cost to Client up to a maximum amount equivalent to the cost of the Services rendered under this Agreement. THE FOREGOING WILL CONSTITUTE GUIDEHOUSE'S SOLE WARRANTY WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE SERVICES AND THE ACTIVITIES INVOLVED IN ITS PREPARATION, AND IS MADE IN LIEU OF ALL OTHER WARRANTIES AND REPRESENTATIONS, EXPRESS OR IMPLIED, INCLUDING ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

7. ***Termination:*** Either party may terminate this Agreement without cause upon no less than thirty (30) days' written notice of termination to the other party; provided however the foregoing without cause termination provision shall not apply when any portion of the professional fees to be paid to Guidehouse under this Agreement are contingent upon the achievement of certain milestones, deliverables, results or other metrics mutually agreed upon by the parties. In the event of termination for any reason, Client will pay Guidehouse for all fees and expenses incurred through the effective date of termination as well as reasonable engagement closing costs.

8. ***Intellectual Property:*** Upon full payment of all amounts due Guidehouse in connection with this Agreement, all rights, title and interest in any information and items, including summaries, documents, reports and portions thereof Guidehouse provides to Client (the “Guidehouse Deliverables”) will become Client’s sole and exclusive property for its internal business purposes and uses pursuant to the scope set forth in the applicable SOW, subject to the exceptions set forth below. Guidehouse shall retain sole and exclusive ownership of all rights, title and interest in its work papers, proprietary information, processes, methodologies, know-how and software, including such information as existed prior to the delivery of the Services and, to the extent such information is of general application, anything that it may discover, create or develop during provision of the Services (“Guidehouse Property”). To the extent the Guidehouse Deliverables contain Guidehouse Property; Client is granted a non-exclusive, non-assignable, royalty-free license to use it in connection with the subject of this Agreement.
  
9. ***Guidehouse Deliverables:*** Guidehouse is providing the Services and Guidehouse Deliverables solely for Client's internal use and benefit. The Services and Guidehouse Deliverables are not for a third party's use, benefit or reliance and Guidehouse disclaims any contractual or other responsibility or duty of care to any third party based upon the Services or Guidehouse Deliverables. Except as described below, Client shall not discuss the Services with or disclose Guidehouse Deliverables to any third party, or otherwise disclose the Services or Guidehouse Deliverables without Guidehouse's prior written consent. Client will indemnify and hold Guidehouse harmless from any and all claims asserted by a third party as a result of such unauthorized release of the Guidehouse Deliverables or reliance on the Services.

The Services and Guidehouse Deliverables, including any oral advice or comments, should not be associated with, referred to or quoted in any manner in any financial statements or any offering memorandum, prospectus, registration statement, public filing, loan or other agreements.

Client may disclose the Guidehouse Deliverables to or discuss information relating to the Services (a) as required by law; (b) as required by any government or regulatory agency with supervisory authority over Client; and (c) with Client’s legal advisors and auditors which are acting solely for Client's benefit and on Client's behalf and which have a need to know such information in order to provide advice or services to Client.

## 10. ***Confidentiality:***

1. “Confidential Information” means the confidential information to be disclosed under this Agreement including certain proprietary information, which may include but is not limited to, strategic planning, financial data, business plans, trade secrets, technical data, computer programs, policies, procedures, benchmarking, know-how, methodologies, discoveries, ideas, concepts, techniques, designs, specifications, drawings, blueprints,

diagrams, flow charts, marketing plans, customer names, claims information, and other technical, financial, or business information not generally known in the marketplace, and Personally Identifiable Information as defined below.

2. “Personally Identifiable Information” means all information that can be used to identify an individual, as may be defined in applicable information security and privacy laws, and includes “Nonpublic Personal Information” (“NPI”), as defined under the Gramm-Leach-Bliley Act (15 U.S.C. §6801 et seq.) and “Protected Health Information” (“PHI”), as defined under the Health and Insurance Portability and Accountability Act of 1996 (42 U.S.C. §1320d) (“HIPAA.”)
3. The party disclosing the Confidential Information will be referred to as the “Disclosing Party” and the party receiving the Confidential Information will be referred as the “Recipient.” It is understood that one party can, at certain times, be a “Recipient” and at other times a “Disclosing Party.”
4. Recipient agrees that neither it, nor any of its employees, officers, directors, agents, and representatives who need to know such information (collectively, its “Representatives”) will: (a) in any fashion or for any purpose use the Confidential Information except for the purpose set forth in the applicable SOW; or (b) disclose, divulge, publish or disseminate the Confidential Information except as expressly authorized by this Agreement. Recipient further agrees that it and its Representatives will: (y) take all reasonable measures to protect the confidentiality of, and avoid disclosure or use of, the Confidential Information so as to prevent it from entering the public domain or falling into the possession of persons other than those authorized by this Agreement to have access to it; and (z) only permit those Representatives of Recipient who are authorized to participate, directly or indirectly, to have access to Confidential Information.
5. Confidential Information shall not include any information (a) previously known by the Recipient, (b) independently developed by the Recipient, without use of any Confidential Information, (c) acquired by the Recipient from a third party that is not, to Recipient’s knowledge after due inquiry, under any legal obligation not to disclose such information or (d) that is, or becomes, public through no breach by the Recipient of this Agreement.
6. Accordingly, each party agrees, subject to applicable law or court order, not to disclose any of its communications, or any of the information it receives and develops in the course of the Services, to any person or entity apart from the other party and such other persons or entities as the other party may designate.



7. If access to any of the materials and information in Guidehouse's possession relating to this Agreement are sought by a third party, or any of its professionals are requested or compelled to testify as a fact witness in any legal proceeding related to this Agreement, by subpoena or otherwise, or it is made a party to any litigation related to this Agreement, Guidehouse will promptly notify Client of such action, and either tender to Client its defense responding to such request and cooperate with Client concerning Guidehouse's response thereto or retain counsel for its defense. In such event, Client shall compensate Guidehouse at its standard billing rates for its professional fees and reimburse Guidehouse's expenses, including reasonable attorneys' fees (internal and external), involved in responding to such action.
8. If any of Guidehouse's professionals are asked to provide testimony, it may be necessary for him or her to resist efforts by a third party to elicit confidential and proprietary materials of Guidehouse and other Guidehouse clients. Guidehouse will take all reasonable efforts to protect the interests of Client, consistent with its need to protect Guidehouse's Confidential Information as well as the Confidential Information of other Guidehouse clients and to comply with Guidehouse's applicable non-disclosure obligations herein.
9. Guidehouse shall implement and maintain commercially reasonable administrative, technical and physical safeguards designed to secure the Confidential Information sufficient to comply with applicable law.
10. The confidentiality obligations in this Section 10 (Confidentiality) shall survive the termination or expiration of this Agreement.
11. **Data Protection:** By accepting these terms of engagement, Client is giving positive consent for Guidehouse to obtain, store and process any personal data acquired by Guidehouse in the course of this engagement. This may include making credit and money laundering checks and retaining the results.

Client agrees that Guidehouse may provide any such personal data to any other Guidehouse entity or other third party. Where the provision of Guidehouse's services involves the processing of personal data belonging to employees, customers or other third parties, Client represents that Client has acquired the necessary consent before providing the relevant data to Guidehouse or that Client is otherwise entitled to provide it to Guidehouse.

In the event that Guidehouse's Services require Guidehouse to process personal data of individuals located in the European Union or Switzerland, any such processing will be governed by the standard contractual clauses approved by the European Commission. **If Guidehouse's Services requires the processing of personal data of individuals residing in European Economic Area (EEA), for Client, Parties will conclude a Data Protection Agreement as attached as Appendix C to this Agreement.**

In the event that Guidehouse's Services require Guidehouse to access Protected Health Information, the parties agree that the Business Associate Agreement attached as Appendix D to this Agreement will apply.

12. ***Use of Data:*** Notwithstanding any other term or provision in the Agreement, Client permits Guidehouse to use Client's data for purposes other than those set forth in this Agreement; provided however that any Personally Identifiable Information in such data shall be rendered de-identified.
  
13. ***Conflicts of Interest:*** Guidehouse is not aware of circumstances that constitute a conflict of interest or that would otherwise impair Guidehouse's ability to provide objective assistance. Guidehouse's determination of conflicts is based primarily on the substance of its work and not the parties involved. Guidehouse is a large consulting company that is engaged by many companies and individuals. Guidehouse may have in the past represented, may currently represent or may in the future represent other clients whose interests may have been, may currently be or may become adverse to Client in litigation, transactions, or other matters (collectively "Other Clients"). Therefore as a condition to Guidehouse's undertaking to provide the Services to the Client, Client agrees that Guidehouse may continue to represent, and in the future may represent, Other Clients provided however that Guidehouse agrees that it will not accept retentions by Other Clients that would be adverse to Client in the same legal proceeding on the factual matters that are the subject matter of an engagement set forth under the applicable SOW.
  
14. ***Limitation of Liability:*** Notwithstanding the terms of any other provision, the total liability of Guidehouse and its affiliates, directors, officers, employees, subcontractors, agents and representatives for all claims of any kind arising out of this Agreement, whether in contract, tort or otherwise, shall be limited to the total fees paid to Guidehouse under the applicable SOW in the preceding 12 months. Neither Guidehouse nor Client shall in any event be liable for any indirect, consequential or punitive damages, even if Client or Guidehouse have been advised of the possibility of such damages. No action, regardless of form, arising out of or relating to this Agreement, may be brought by either party more than one year after the cause of action has accrued, except an action for non-payment may be brought within one year following the date of the last payment due under this Agreement. Guidehouse shall not be liable for any loss or destruction of any valuable documents provided to Guidehouse. Client shall be responsible for insuring such documents against loss and destruction.
  
15. ***OFAC Representations:*** Client represents and warrants the following with respect to the U.S. Treasury Department's Office of Foreign Assets Control (OFAC): (a) Client does not have any nexus with persons or entities on any of OFAC's sanctions list (e.g. SSI, SDN, FSE etc.) either through large shareholders, employees, beneficial owners, vendors, affiliated entities (i.e. affiliates or subsidiaries), third parties, customer base or otherwise in violation of applicable OFAC regulations; (b) Client does not have any operations in or

derive revenue from any comprehensive OFAC-sanctioned jurisdiction (currently, Cuba, Iran, Syria, North Korea, the Crimea); (c) Client does not have any operations in or derive any revenue from any OFAC-sanctioned country program (as such country sanctioned programs are identified in the OFAC regulations) or any OFAC-sanctioned persons (as identified on the OFAC list of Specially Designated Nationals (“SDN List”)) or entities 50 percent owned or controlled by one or more parties on the SDN List; and (d) Client shall not remit payment for Guidehouse’s fees and expenses from revenues derived by activities involving any OFAC-sanctioned country or sanctioned party. Client has in place policies and procedures designed to ensure compliance with applicable sanctions.

16. **Resolution of Disputes:** To promote rapid and economical resolution of disputes that may arise, any and all disputes or claims related to or arising from this Agreement, except claims by Guidehouse for non-payment of amounts owed hereunder, shall be resolved by final, binding and confidential arbitration conducted in New York, New York by JAMS Inc. (formerly Judicial Arbitration and Mediation Services) (“JAMS”) under the then-applicable JAMS rules, including its optional appellate procedure if the parties so elect. The parties hereby waive their rights to have any such disputes and claims litigated in a court or by a jury. This Agreement shall be governed by and construed in accordance with the laws of the State of New York, without regard to its conflict of laws principles. In any arbitration (or litigation in the case of claims by Guidehouse for nonpayment of amounts owed hereunder), the prevailing party shall be entitled to recover from the other party reasonable costs and expenses, including reasonable attorneys’ fees, incurred in enforcing this Agreement and reasonable attorneys’ fees and costs incurred in obtaining, appealing or enforcing any judgment entered by the arbitrator or the court. The waiver of a breach of any provision of this Agreement by the other party shall not operate or be construed as a waiver of any subsequent or additional breach.
17. **Restriction on Use of Personnel:** Client agrees that during the term of this Agreement (including any renewals and extensions thereof), and for a period of one year following the termination of the applicable SOW (“Restriction Period”), neither Client nor any affiliate, parent or subsidiary thereof will knowingly employ or engage as an independent contractor, consultant or otherwise, any person who, during the Restriction Period, is or was an employee or independent contractor of Guidehouse that provided Services under the applicable SOW; provided however that the foregoing shall not prohibit Client from employing an individual who responds to a general advertisement for employment (whether or not made by a professional search firm).
18. **Disposition of Documents:** At the conclusion of the Services, Client will have the following options with respect to disposition of documents related to this Agreement. Client may (a) direct Guidehouse to return all such documents to Client at the client’s expense; or (b) authorize Guidehouse to discard or destroy all documents. In limited circumstances, Guidehouse may agree to store client engagement documents at Client’s expense. The terms and pricing for all storage, as agreed by the parties, will be provided

to the Client at the beginning of any storage period. If the Client does not request option (a) or (b) above within sixty (60) days after the conclusion of the Services under the applicable SOW, Guidehouse will, to the extent practicable, implement option (a). Guidehouse may retain a copy of its reports and work papers for its internal recordkeeping purposes or compliance with applicable professional standards.

19. **Third Party Beneficiaries:** This Agreement does not and is not intended to confer any rights or remedies upon any person or entity other than the parties.

20. **Force Majeure:** Guidehouse shall not be deemed in default of any provision of this Agreement or be liable for any delay, failure in performance, or interruption of the Services resulting directly or indirectly from acts of God, electronic virus attack or infiltration, civil or military authority action, civil disturbance, war, epidemic, strike and other labor disputes, fires, floods, other catastrophes, and other forces beyond its reasonable control making it commercially impracticable to perform the obligations of this Agreement.

21. **Notices:** All notices given under or pursuant to the Agreement will be sent by Certified or Registered Mail, Return Receipt Requested, and will be deemed to have been delivered when physically delivered to Client or Guidehouse at the following address:

If to Guidehouse:

**[Note: Insert Guidehouse Partner Name and Office Address]**

Guidehouse Inc.

\_\_\_\_\_  
\_\_\_\_\_

Attention: \_\_\_\_\_

With a copy to:

Guidehouse Inc.

1676 International Drive, Suite 800

McLean, VA 22102

Attention: Office of the General Counsel

If to Client:

\_\_\_\_\_

Attention: \_\_\_\_\_

22. **Publicity:** Client and Guidehouse agree to submit to the other all advertising, written sales promotion, press releases and other publicity matters relating to this Agreement in which the other party's name or mark is mentioned or language from which the connection of such name or mark, and will not publish or use such advertising, sales promotion, press releases, or publicity matters without prior written approval of the other party. Notwithstanding any other provision, Guidehouse may include Client's name, and a factual description of the work performed under this Agreement in its list of references and in the experience section of proposals to third parties, in internal business planning documents and in its annual report, and whenever required by reason of legal, accounting or regulatory requirements.

## APPENDIX B

### STATEMENT OF WORK [TEMPLATE]

**[Note: This Statement of Work Template is intended for reference purposes and should not be populated. Instead please copy and paste this template separately, populate and insert at the end of this document OR download the General Consulting SOW template from the Hub, populate and send along with this MSA. For all questions, please contact Guidehouse Legal – Neil Hazaray or Megan Marshall.]**

#### MASTER CONSULTING SERVICES AGREEMENT

BETWEEN

GUIDEHOUSE INC.

AND

**[INSERT FULL NAME OF CLIENT]**

DATED

**[INSERT EFFECTIVE DATE]**

SOW NO. 2022-**[INSERT ORDER #]**

This Statement of Work No. 2022-**[INSERT ORDER #]** ("SOW"), effective as of \_\_\_\_\_, 20\_\_ (the "SOW Effective Date"), by and between Guidehouse Inc. ("Guidehouse") and **[Insert Full Name of Client's]** (for purposes of this SOW, "Client"), is executed pursuant to and as part of that certain Master

Consulting Services Agreement by and between Guidehouse and Client, effective as of [REDACTED], 20[REDACTED] (the "Agreement").

NOW, THEREFORE, for and in consideration of the foregoing premises, and the agreements of the parties set forth below, Client and Guidehouse agree as follows:

**1. Scope of Services.**

Guidehouse will provide the following [REDACTED] services to Client:

**[Insert background and overview of services to be provided.]**

**2. Project Deliverables.**

**[Summarize the specific project deliverables to be delivered by Guidehouse under this SOW.]**

**3. Fees and Expenses.**

**[Summarize the fees to be paid by Client to Guidehouse. If the fees are invoiced on a time and materials basis, please include a billing rate card by level.]**

**4. Retainer.**

**[If a retainer is required, include the following language. If a retainer is not required, please delete this Section 4.]**

Client further agrees that the amount of the retainer held by Guidehouse will at all times be not less than \$\_\_\_\_\_, and that Client will, from time to time, remit to Guidehouse such additional amounts as may be necessary to maintain the total amount of the retainer currently held by Guidehouse at levels Guidehouse deems appropriate in its sole discretion. If Client fails to comply with its obligations under this Section, then Guidehouse shall have the right to cease work and/or terminate this SOW until Client does so comply without incurring any liability to Client whatsoever.

**5. Term and Schedule.**

The term of this SOW shall begin on the SOW Effective Date and end on [REDACTED], 202[REDACTED] (the "Term").

**[Summarize the project schedule and any milestones here if necessary.]**



**6. Staffing.**

**[Describe the Guidehouse personnel who will perform Services under this SOW.]**

**7. Contact Information.**

<b><u>Client Project Manager</u></b>	<b><u>Guidehouse Project Manager</u></b>
<b>[Insert Client Project Manager's Name]</b>	<b>[Insert Guidehouse Project Manager's Name]</b>
<b>[Insert Client Project Manager's Title]</b>	<b>[Insert Guidehouse Project Manager's Title]</b>
<b>[Insert Client Project Manager's Telephone Number]</b>	<b>[Insert Guidehouse Project Manager's Telephone Number]</b>
<b>[Insert Client Project Manager's Email Address]</b>	<b>[Insert Guidehouse Project Manager's Email Address]</b>

**8. Additional Legal Terms Applicable to this SOW.**

**[Guidehouse Legal to include practice specific terms.]**

**9. Incorporation by Reference; Conflict.**

This SOW is governed by the terms and conditions of the Agreement. The terms of the Agreement are hereby expressly incorporated by reference into and made a part of this SOW. In the event of a conflict between the terms and conditions of the Agreement and this SOW, the terms of the Agreement shall take precedence and control over those of this SOW unless otherwise and specifically agreed to in writing by all parties. In the event of a conflict between the terms and conditions of this SOW and any related exhibits, attachments, or proposals, the terms of this SOW shall take precedence and control over those of the exhibit, attachment, or proposal hereto unless otherwise agreed to in writing by all parties. Any defined terms not otherwise defined herein shall have the meanings set forth in the Agreement. This SOW may be executed (including by facsimile and PDF signature) in one or more counterparts, with the same effect as if the parties had signed the same document. This SOW may be modified or amended only by a written document signed by both parties. The parties hereto acknowledge having read this SOW and agree to be bound by its terms.

IN WITNESS WHEREOF, the parties have each caused this SOW to be signed and delivered by their duly authorized representatives, all as of the SOW Effective Date.

**[INSERT FULL NAME OF CLIENT]**

**GUIDEHOUSE INC.**

By:

By:

Name:

Name:

Title:

Title: Partner

## 7. Proposed Budget

Below is our estimation of the work and pricing breakdown across each of our deliverables. We will only invoice upon the completion of all three deliverables.

<b>Deliverable</b>	<b>Estimated Pricing</b>
<b>Deliverable 1:</b> Current State Findings Report	\$100,000
<b>Deliverable 2:</b> Journey Map(s)	\$100,000
<b>Deliverable 3:</b> Recommendations Report	\$160,000
Total	\$360,000

## Appendix A. Equal Employment

The Employer Information Report EEO-1 provided below is for all employees in the United States. Of these employees, 4,573 are women and 3,815 are minorities.

CO= T527527		EQUAL EMPLOYMENT OPPORTUNITY													OVERALL		
U= T527527		2021 EMPLOYER INFORMATION REPORT EEO-1													TOTALS		
		CONSOLIDATED REPORT															
<b>SECTION B - COMPANY IDENTIFICATION</b>													<b>SECTION C - TEST FOR FILING REQUIREMENT</b>				
1. Guidehouse Inc 1676 International Drive McLean, VA 22102													2.a. Guidehouse Inc 1676 International Drive McLean, VA 22102				1- Y 2- Y 3- Y DUNS= 022582428
													SECTION E - ESTABLISHMENT INFORMATION				
													NAICS: 541611 - Administrative Management and General Management Consulting Services				
<b>SECTION D - EMPLOYMENT DATA</b>																	
JOB CATEGORIES	HISPANIC OR LATINO		NOT-HISPANIC OR LATINO														
	MALE	FEMALE	*****MALE*****						*****FEMALE*****								
			WHITE	BLACK OR AFRICAN AMERICAN	NATIVE HAWAIIAN OR PACIFIC ISLANDER	ASIAN	AMERICAN INDIAN OR ALASKAN NATIVE	TWO OR MORE RACES	WHITE	BLACK OR AFRICAN AMERICAN	NATIVE HAWAIIAN OR PACIFIC ISLANDER	ASIAN	AMERICAN INDIAN OR ALASKAN NATIVE			TWO OR MORE RACES	
EXECUTIVE /SR. OFFICIALS & MGRS	8	0	123	3	0	12	0	1	43	6	0	2	0	1	199		
FIRST/MID OFFICIALS & MGRS	71	47	850	84	4	177	1	15	625	117	0	127	3	17	2138		
PROFESSIONALS	176	172	1556	366	2	459	1	79	1220	563	0	468	9	73	5144		
TECHNICIANS	5	0	22	11	0	2	0	0	9	6	0	3	0	0	58		
SALES WORKERS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ADMINISTRATIVE SUPPORT	29	122	64	51	1	20	1	8	448	433	2	40	4	13	1236		
CRAFT WORKERS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
OPERATIVES	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
LABORERS & HELPERS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
SERVICE WORKERS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
TOTAL	289	341	2615	515	7	670	3	103	2345	1125	2	640	16	104	8775		
PREVIOUS REPORT TOTAL	234	631	1793	323	5	384	1	48	1912	779	5	375	19	72	6581		
<b>SECTION F - REMARKS</b>																	
DATES OF PAYROLL PERIOD: 12/16/2021 THRU 12/31/2021 <b>SECTION G - CERTIFICATION</b> CERTIFYING OFFICIAL: Shamir Patel EMAIL: spatel@guidehouse.com EEO1 REPORT CONTACT PERSON: DORENE DRESSEL EMAIL: DDRESSEL@NAVIGANT.COM																	
CERTIFIED DATE [EST]: 5/17/2022 3:45 PM TITLE: Chief Ethics and Compliance Officer PHONE: 202-973-4572 TITLE: DIRECTOR PHONE: 3125836919																	

## Appendix B. M/WBE Commitment

Guidehouse is committed to engaging and teaming with diverse partners. Guidehouse has a long history of working with Minority or Women- owned Business Enterprises (M/WBEs) on many occasions and sustains a number of deep relationships with City and State-based entities. We take our relationships with M/WBEs seriously and make a concerted effort to support their work with the City and the State. We have demonstrated our commitment to supporting M/WBEs by:

- **Managing an M/WBE Mentorship Program.** This program was developed by Guidehouse to provide guidance to select NYS and NYC M/WBE firms throughout the course of the year, with the intention of helping these firms expand their business and gain more solid footing when approaching new opportunities.
- **Continuing to collaborate with the City and foster the growth of M/WBEs** in accordance with the 2022 Mayoral Economic Recovery Blueprint. Our engagements with the New York City Mayor’s Office of Minority and Women-owned Business Enterprises (OM/WBE) and New York City Housing Authority (NYCHA) Procurement Department, along with others, reflect our commitment to growing M/WBE contracting opportunities in New York City.

When approaching a partnership with a new M/WBE, we focus on bringing in firms with relevant and critical areas of expertise needed to deliver for our clients. Guidehouse does not merely partner with M/WBE firms as a formality, but rather as a strategic part of the work we do. The nuanced expertise each individual M/WBE partner contributes ensures that we offer the most complete service possible to our clients. Whether our partners have subject-matter expertise in economic analysis or community engagement, each of our M/WBE partners provide unique skillsets that allow Guidehouse, in coordination with our partners, to successfully go above and beyond our clients’ needs. Some of our initiatives to foster strong, long-lasting relationships with M/WBEs have included:

- **Attending State- or City-sponsored M/WBE fairs to meet additional firms.** Guidehouse is proactive in exploring opportunities to engage with additional M/WBE firms, including through frequent attendance of State- and/or City-sponsored M/WBE fairs.
- **Actively pursuing partnerships with M/WBEs.** For every engagement response, we actively consider all the ways in which an M/WBE could participate and enhance the quality of work delivered throughout the course of the engagement. We leverage connections made throughout prior successful engagements to establish a network of M/WBE firms. We are also continuously exploring new partnerships with additional M/WBE firms on an ad hoc basis, using research to supplement our outreach to potential partnering firms.

We view M/WBEs as an extension of the Guidehouse team, enhancing our capabilities and helping us meet our clients’ needs. M/WBE and Guidehouse staff work as one, integrated team, ensuring a smooth experience for our clients and bringing a diverse set of thoughts and skills to the table. For this project, we will be partnering with Karp Strategies, a New York City based WBE/DBE/SBE certified firm that we have a long-standing working relationship with.

NYC HDC’s dedication to the inclusion of minority and women-owned business aligns with our own priorities, which is reflected in our dedication to consistently working with M/WBEs across all our engagements. Often, we partner with M/WBE firms on our projects even when it is not required, particularly in the New York City. In utilizing the synergetic partnerships our firm has cultivated with M/WBE firms, we feel confident in the skills and insights we can provide.

## Appendix C. NYC Location

Guidehouse has a physical office in New York City at 685 3rd Ave, 14th floor, New York, NY, 10017 where over 2,000 staff members in the New York metro area are based. Guidehouse is committed to making a positive impact in the communities in which we operate, and our office in the City reflects the company's strong emphasis on hiring locally. Guidehouse has not relocated any employees out of New York City since 2017 and is committed to maintaining our strong presence in New York. Guidehouse has demonstrated a commitment to the City of New York through:

- **Investing in the local pool of talent.** Guidehouse partners with schools and universities in New York City to offer internships and other career development opportunities to students. These programs provide students with hands-on experience in management consulting and the opportunity to build a network of professional contacts in the field. Many of these students go on to pursue careers with Guidehouse or other firms in the City, helping to create a more diverse and dynamic workforce. At a time when many companies are relocating their operations to other cities or states in search of lower costs, Guidehouse recognizes the value of investing in the local workforce. Guidehouse understands that New York City's local talent pool is highly-skilled and diverse, with a wide range of expertise and perspectives that help drive success for our clients. Guidehouse's emphasis on investing in New York City's workforce and hiring locally strengthens its service to clients while creating job opportunities and supporting the City's economy.
- **Providing local corporate citizenship opportunities.** Guidehouse is also intentional about creating opportunities for its current employees to give back to New York City. For example, the New York office's social team organized a community service event to participate in the International Coastal Cleanup on Randalls Island, held by the New York City Department of Parks and Recreation, organized as part of a global initiative that aims to remove debris and litter from shorelines and waterways around the world. Separately, we have organized a practice-wide fundraising effort for the Tunnels to Towers Foundation's 5K to raise money for 9/11 heroes and their families. In the lead-up to the event, Guidehouse will be hosting multiple fundraising events to hit our \$5,000 goal.
- **Contributing leadership and board involvement.** Guidehouse employees are actively involved in organizations that contribute to the development and progress of New York City. Guidehouse Partner, Anaita Kasad, serves as an Executive Committee member of the Regional Plan Association, a non-profit organization that works towards the improvement of the New York metropolitan area's infrastructure, economy, and environment. She also serves as the Chair of the Business and Finance Committee of the Career and Technical Education Advisory Council for the New York City Department of Education. Similarly, Raquel Malmberg, also a Partner at Guidehouse, serves on the board of the Prospect Park Alliance, a non-profit organization that works towards the preservation and enhancement of one of Brooklyn's most iconic landmarks. This active participation in the City's non-profit organizations exemplifies Guidehouse's dedication to supporting and promoting the growth and development of New York City.

There are many ways in which Guidehouse demonstrates its commitment to New York City beyond its physical presence, and we continually strive to identify new ways to demonstrate dedication to supporting and promoting the growth and development of the City.



**Appendix D. Local Law 34 Compliance**

The Doing Business Data form is included in the email submission as a separate attachment.