

McKinsey  
& Company

New York City Housing Development  
Corporation

# Homeless Housing Placements Evaluation

Proposal Response

**February 22, 2023**

**Submitted to:**  
**New York City Housing Development Corporation**  
**Mr. Alex Merchant**  
Submitted via email to:  
amerchant@nychdc.com

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February 22, 2023

Mr. Alex Merchant  
Director of Process Improvement for Housing Placements  
New York City Housing Development Corporation  
Submitted via email to: [amerchant@nychdc.com](mailto:amerchant@nychdc.com)

**Subject: Letter of Interest – New York City Housing Development Corporation Homeless Housing Placements Evaluation Request for Proposal**

Dear Mr. Merchant:

Please find attached McKinsey & Company, Inc. Washington D.C.'s (McKinsey)'s response to New York City (NYC) Housing Development Corporation's (HDC's) Homeless Housing Placements Evaluation Request for Proposal (RFP). We look forward to the potential to serve HDC on this effort to evaluate the homeless housing placement process and to offer options for your consideration to significantly reduce processing time and administrative burden while improving services.

**Our Team's Interest and Availability.** NYC and its supporting partners play a critical role in providing essential services to millions of New Yorkers. The NYC HDC and the NYC Department of Housing Preservation and Development (HPD) have made significant strides in housing vulnerable New Yorkers who face homelessness. We know this process is uniquely challenging due to the City's multiple obligations: ensuring timely placement of persons experiencing homelessness in high-quality HDC- and HPD-financed and supported housing and providing a seamless and efficient experience to service provider partners, all while ensuring public resources are used as effectively as possible. As the volume of housing placements increases, we recognize the importance of optimizing the placement process to ensure the City's residents experiencing homelessness can find housing as quickly as possible. We also recognize the importance of reducing administrative burden on the City and its partners wherever possible.

We acknowledge the size, scale, and complexity of this undertaking. While multiple prior administrations have attempted to resolve the issues associated with housing persons experiencing homelessness, these issues have never been fully remediated given the immense complexity and challenge of sustained improvements. These challenges have been dramatically exacerbated in recent months as the volume of individuals needing housing has surged. The Adams Administration, HDC, and HPD's commitment to tackling this problem requires a partner with extensive **experience** and expertise in serving the City and New Yorkers, one that is familiar with the **New York public sector**, housing, human services, and operations, and how they intricately intertwine. This partner must know how to optimize **processes** with a customer-backed lens and must be able to do so with the utmost **speed**.

As a global management consulting firm, McKinsey has been a trusted advisor and counselor to the world's leading public, private, and social sector clients for nearly 100 years, having served over 1,600 public sector clients globally in the past five years alone. These clients include government and human services organizations, housing owners and operators, service providers, and nonprofit entities focused on providing social services. We partner with

organizations to tackle their most difficult challenges, and our purpose is to create positive, enduring change in the world.

Specifically, we have worked with the City since the 1970s on a wide-ranging set of topics and have therefore both a deep understanding of the city's challenges as well as a deep interest in seeing impact and change for the better as we outline in the below. We are committed to supporting the City on its critical priorities, including its efforts to house vulnerable New Yorkers who face homelessness, and we believe we are uniquely qualified to help in challenging and complex situations, where other efforts have not succeeded. By working with McKinsey, the City would gain a partner that brings five key attributes we believe are critical for this work:

- 1. Deep knowledge of NYC and its government, including this current administration. For the last decade, we have been honored to work on some of the City's biggest challenges. This means we know what it takes to make change happen in New York, which informs the highly tailored and differentiated solutions we can bring to the City.** With a professional relationship dating back to the 1970s, we understand the practical reality and context of City government and the entities that partner with the City to serve New Yorkers. We are deeply aware of how the size and scale of our city make it unique, and we know how to make change happen in that context. Examples of our service include conducting the landmark review of emergency response after 9/11, helping to reduce response times to the most life-threatening medical emergencies by 7%, and helping affected low-housing residents to restore their power after Hurricane Sandy within 12 days. Since May 2020, we have served the City on critical COVID-19 response efforts, including helping to stand up, scale and sustain the City's contract-tracing operations and providing wraparound services to residents including vulnerable populations.

For this administration, we provided support for its transition in the Fall of 2021 and into 2022, and we supported the Mayor's Office of Contract Services in establishing new processes to streamline and modernize its interactions and processes with nonprofit providers, reducing inefficiencies and delays as well as improving the customer experience. This recent work entailed addressing similar process needs to the challenges here: assessing the current state of cross-agency operations, deploying our tools and assets to conduct a gap analysis, and developing customer-centric optimization recommendations. These and other efforts have given us a deep understanding of the City's unique context, challenges, and ways of working. This understanding informs our approach to developing a highly tailored solution for the City at an accelerated pace, enabling us to circumvent a lengthy ramp-up and build momentum from Day 1.

- 2. Speed and flexibility are non-negotiable. We work fast and around-the-clock, can staff up and down rapidly, and are able to start within 24 hours of award if needed. Not only does this mean we will work quickly and tirelessly to deliver on the City's objectives; it means we can accelerate the time to impact for the City and those who rely on its services.** We understand and appreciate the need for timely support for urgent, high-impact efforts like this one. Our approaches are designed to expedite delivery, solutioning, and impact —while indexing heavily on stakeholder engagement and capability building to drive long-term success. Our engagements can start as soon as 24 hours after our contract or task order is awarded. On any given week, we have thousands of consultants available who can be quickly deployed, and our "One Firm" model means our

teams know how to bring the full expertise of the firm to bear from Day 1 from across all of our offices – nationally and globally. In New York alone, we have ~3,000 colleagues. Our hypothesis-driven method provides “Day 1” answers that we test, sharpen, and strengthen from there, using efficient parallel processing of all our interconnected workstreams to ensure breadth and depth across our answers. As such, we believe we can deliver on most objectives outlined in HDC’s RFP in six weeks—less than half of the 90-day timeline specified— with an additional four-week period of support for additional syndication and leadership support. This means an expedited timeline for the City to consider and act on the options provided, knowing every day makes a difference for those who rely on the City’s services.

- 3. Pragmatic experience in human and social services. We have a demonstrated history of working in this field and will leverage our expertise to get to road-tested and impact-oriented options for the City.** We have extensive experience working on programs for special and vulnerable populations, including those served by HDC and HPD, as well as other agencies such as Department of Social Services (DSS). For example, through our Medicaid and State Health and Human Services work, we have served over 30 federal, state, and local agencies in the past five years on projects for special or vulnerable populations. Through our Center for Societal Benefit through Healthcare, we collaborate with national leaders to drive positive innovation in areas that have been historically underinvested in but are critical for the benefit of society. We have published a number of research articles on homelessness including our 2018 report, [“The economics of homelessness in Seattle and King County”](#), a 2019 report, [“Homelessness in the San Francisco Bay Area: The crisis and a path forward”](#), and a follow-on report with in partnership with the Bay Area Council Economic Institute, [“Bay Area Homelessness: A regional view of a regional crisis.”](#)

During the COVID-19 pandemic, we supported states and local governments, as well as social sector organizations, in responding to the crisis. This included supporting organizations dedicated to addressing individuals who were unstably housed or experiencing homelessness across the country. For example, we supported the United Way of Los Angeles in assisting the Los Angeles Homeless Service Authority (LAHSA) in its COVID-19 response through the early stages of the pandemic. We provided support in conducting current state analysis to inform LAHSA's options and assessing the potential impact of their initial strategies. Finally, we have designed and operationalized public and affordable housing plans with several cities and states over the past five years. We know what works and what does not at the intersection of housing and government. We will leverage our expertise to shorten the learning curve, identify and tailor relevant best practices for the City, and craft options for the City to consider that are practical, road-tested, and impact-oriented.

- 4. Excellent, “plug & play” tools that can help on Day 1. We bring a full suite of proprietary capabilities and tools to ensure the City benefits from proven solutions.** Because HDC and HPD seek to improve the housing placement process from the perspectives of all stakeholders involved, the ability to understand, quantify and address the “customer” experience is as important as understanding objective process optimization. Our customer experience tools such as our Customer Journey program have been developed

with leaders in customer experience such as Disney and Southwest Airlines. These tools have been adapted and successfully deployed in state Departments of Motor Vehicles, human services agencies, and broad reform efforts in states such as California and New Jersey. One such tool, our *McKinsey Journey Pulse Survey*, takes just 2 weeks to identify drivers of satisfaction, unmet needs, and pain points across different stakeholder groups throughout a journey process. We have deployed our *Journey Pulse Survey* previously in work for NYC and can do so again in support of HDC and HPD's objectives. Furthermore, if organizational or operating model roadblocks arise requiring deeper investigation, we can leverage powerful diagnostic capabilities, such as our *Rapid Maturity Assessment* and *Operational Excellence Index*, to evaluate an organization's operational maturity benchmarked against data from over 1,000 organizations. We could draw from tools like these to evaluate the relative impacts of various operational enablers (e.g., systems issues, talent gaps, etc.) to help prioritize opportunities for improvement. Access to these road-tested, best-in-class tools will ensure that the City benefits from proven solutions implemented across similar scenarios with minimal recalibration required, helping us accelerate the path to impact.

5. **Building agency capability is core to what we do.** Importantly, as part of our approach, we anchor on capability building and ensuring a seamless transition to make sure that the City is equipped with all the tools and skills it needs to lead implementation. Unlike other firms that focus on "knowledge transfer" at the end of a project, we focus on building capabilities from the beginning. This means that project teams will develop new skills that will make them more effective and energized. We aim to work ourselves out of a job by "standing down" as the City's teams "stands up".

We are inspired by and committed to supporting the City on this priority, and we would be privileged to do so provided the opportunity. As indicated in the RFP amendment, Oral Presentations will be held on March 2<sup>nd</sup>. The McKinsey team has proactively blocked 8:00-10:00 AM ET to ensure the entire project team is available in the event we are requested to present. If this time is not available with the HDC evaluation committee, we are happy to arrange another time.

If you have any questions about our proposal response, please do not hesitate to contact me at (202) 731-4792 or [tony\\_demidio@mckinsey.com](mailto:tony_demidio@mckinsey.com). For contractual questions, please contact Samuel Maki, Senior Contracts Counsel, at (202) 961-2189 or [samuel\\_maki@mckinsey.com](mailto:samuel_maki@mckinsey.com) and [mckinsey\\_contracts@mckinsey.com](mailto:mckinsey_contracts@mckinsey.com).

Sincerely,



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## Table of Abbreviations

Acronym	Definition
BIPOC	Black, Indigenous, and People of Color
CAD	Computer-Aided Design
CX	Customer Experience
DHS	Department of Homeless Services
DOE	Department of Education
DOHMH	Department of Health & Mental Hygiene
DOL	Department of Labor
DSS	Department of Social Services
EMS	Emergency Medical Services
EO	Enterprise Operations
FAC	Father Alfred's Center
FEMA	Federal Emergency Management Agency
FFP	Firm Fixed Price
HDC	Housing Development Corporation
HPD	Housing Preservation and Development
HR	Human Resources
HRA	Human Resources Administration
HUD	Housing and Urban Development
IDV	Identity Verification
IT	Information Technology
LAHSA	Los Angeles Homeless Service Authority
MSA	Master Service Agreement
MWBE	Minority and Women Owned Business Enterprise
NYC	New York City
NYCHA	New York City Housing Authority
NYS	New York State
NYT	New York Times
NYU	New York University
PHA	Public Housing Authorities
PIT	Point-in-Time
QA	Quality Assurance
RACI	Responsible, Accountable, Consulted, Informed
RFP	Request for Proposal
ROI	Return on Investment
TGNC	Transgender and Non-Conforming
UI	Unemployment Insurance
VCC	Vaccine Command Center

## 1.0 Project Understanding and Approach

HDC and HPD are seeking assistance to significantly reduce processing time and administrative burden associated with placing families facing homelessness. The City has made great strides on this front, but with demand for placements increasing, designing a more streamlined end-to-end process is essential to the continued, timely delivery of critical housing services for vulnerable New Yorkers and an improved experience for all parties involved. To achieve this goal, the City has established a Homeless Housing Placements Task Force composed of HDC, HPD, the Department of Homeless Services (DHS), and the Human Resources Administration (HRA).

The City seeks a comprehensive report in up to 90 days that analyzes the current process to place DHS shelter residents in HDC- and HPD-financed or supported housing and delivers options to dramatically reduce the time this process takes. As we understand the importance of moving quickly, our proposed approach will require approximately six weeks of team effort to deliver on the majority of HDC and HPD's objectives (within the 90-day duration outlined in RFP), followed by up to four weeks of additional support for syndication and leadership counseling. We see this broken down into four tasks:

- **TASK 1: Overall project management and report consolidation.** McKinsey will assume responsibility for end-to-end project management, including coordination across City stakeholder groups and leadership. Understanding the urgency of this effort, we will jump-start the engagement with a "Phase 0" week in which we will conduct a disciplined project kick-off, align on the workplan, and consolidate data requests. A dedicated McKinsey Project Manager will quarterback the project management effort with guidance and oversight from our leadership team. This function will be responsible for a consolidated journey map(s), a synthesis of current gaps in the process, and options for City consideration detailed in Tasks 2 and 3 below into a consolidated final report after six weeks. From there, support will continue for up to four additional weeks to help with the development of presentation collateral and further syndication, as detailed in Task 4 below. The Project update and governance cadence will be jointly aligned with HDC and HPD leadership, but we propose (1) weekly check-ins with leadership to ensure alignment on priorities and (2) briefings to a Steering Committee at the conclusion of Tasks 2 and 3 below (at the end of Weeks 4 and 6, respectively).
- **TASK 2: Develop a journey map of the homeless placement process that synthesizes administrative complexities, outlines estimated timeframes, and describes how information flows between steps.** Critical to this effort is a rigorous baseline of the current state placement process outlined in a "journey map." As such, we see this broken down into three sub-tasks:
  - **TASK 2.1: Review the existing housing placement process baseline—including the draft process flow analysis conducted by the City—to identify gaps in the process that create unintended barriers for homeless households, including time-consuming and taxing administrative burdens for clients (RFP Scope of Work 3).** We will spend the first week of the effort identifying, understanding, and documenting existing processes. We will build on any work already completed by the City's own staff to develop a sophisticated mapping of the City's existing process flows and cycle times. We will first ensure a robust understanding of the existing baseline and analysis through interviews with Task Force leads and analytic support staff. Then we will identify gaps in the baseline and align those gaps to potential sources of insight (e.g., stakeholder interviews, publicly available data, etc.). Once we have built this understanding, our team will rapidly develop preliminary perspectives on where the City can achieve the biggest potential operational gains.
  - **TASK 2.2: Supplement this baseline with process details that incorporate feedback from focus group meetings and interviews with stakeholders including City agencies, nonprofit homeless services providers, affordable housing providers, providers of rental subsidies, and others (RFP Objective 3, Scope of Work 4).** We understand that a thorough analysis of each step and timeline of the placement process will require input from multiple perspectives. Specifically, we understand critical stakeholders for engagement to be, at a minimum, City agencies, nonprofit homeless services providers, affordable housing providers, providers of rental subsidies, building marketing agents, caseworkers, and tenant applicants. In parallel with Task 2.1, we will conduct approximately 3-5 focus group meetings and 10-15 stakeholder interviews in the first two weeks of the work to gather critical process details. We will also use these focus groups meetings and interviews to pressure-test existing hypotheses as well as generate new ones. We can deploy our

proprietary *McKinsey Journey Pulse Survey*, which we have previously used in work supporting the City, to provide insight into drivers of satisfaction, unmet needs, and pain points among stakeholders in the placement journey. This could help inform prioritization of the most critical areas of focus for future state process flow design. A synthesis of the feedback heard in focus group meetings and insights generated from our *Journey Pulse Survey* will help close process detail gaps in the existing baseline developed and shed light on opportunities for improvement.

- *TASK 2.3: Map the end-to-end placement journey with information flows and cycle times, and highlight gaps, redundancies, and likely improvement opportunities based on analysis of the process from multiple client perspectives including tenant applicants, caseworkers supporting tenants and building marketing agents processing applications (RFP Objective 4 and 5, Scope of Work 1, 3, and 5).* With the above inputs, we can create a placement “journey map”, which will outline process steps and timelines, synthesize pain points and administrative complexities, and describe how information is received, stored, and shared from one process step to the next (including IT systems or other formats such as spreadsheets, paper logs, etc.). We will create an integrated process map output that visualizes the end-to-end housing placement process, cataloging processes and sub-processes and the policies, systems, information flows and timing at each step. Understanding that such processes might differ based on tenant archetypes, we may develop differentiated journeys based on the stakeholder experiences illuminated in Task 2.2. Furthermore, we will ensure journey maps explicitly identify gaps in the process that create unintended barriers for homeless households (including time-consuming and taxing administrative burdens), as well as areas of redundancy and opportunities for greater efficiency for the government and external parties.
- *TASK 3: Formulate up to ten options for City consideration that dramatically reduce the housing placement process time, improve the client experience, reduce redundancies, and increase efficiency, along with an estimate of time and other resources savings as well as other enablers needed (RFP Objective 1 and 6, Scope of Work 2).* To ensure feasibility for various options, we understand that the analysis should include details on key enablers of implementation success (e.g., changes needed in program design, technology, processing as well as staffing models at the Federal, State, and City level). We will develop a framework to assess the feasibility and estimate the potential impact of each opportunity identified in Task 2.3 to help the Task Force prioritize the most important gaps and challenges to address. To reimagine the future state process, we will deploy best practice design thinking principles in a “design sprint.” The sprint is a 2-3 day intensive design process bringing together a group of core stakeholders to determine what a future state could look like. This entails rapidly identifying critical requirements to reach that future state, bringing it to life through approaches like sketching, wireframing, storyboarding, and prototyping. Embedded in the design sprint is the incorporation of Lean and Six Sigma philosophies, including, but not limited to systematically identifying and addressing activities or requirements that are not value-additive, reducing variation with standardization where appropriate, reducing rework, reducing “wait time,” and simplification and standardization. The outcome of the design sprint will be a list of up to ten options for consideration to streamline the process. While we can evaluate the impact of present policies and regulations, these options will not suggest or advise on regulatory or policy changes.
- *TASK 4: Help inform the creation of presentation collateral and a syndication plan around the effort to assist HDC in messaging (RFP Objective 2).* Critical to the success of these potential actions is ensuring other City agencies and partners in the process understand the case for change. Using the stakeholder mapping developed in Task 2.2, we will help the Task Force tailor presentation materials to that speak to different stakeholder groups. We will help the City test and refine these materials with various stakeholders to ensure they are as robust as possible. We will provide leadership counseling on the go-forward syndication plan and potential owners beyond our engagement to ensure the impact we identify can be realized.

We believe we are uniquely positioned to support the City as a distinctive partner in this effort given (1) our deep knowledge of City government and our history of improving the City’s processes, (2) our pragmatic experience in human and social services, (3) our proprietary tools and deep expertise in optimizing complex processes with road-tested solutions, and (4) our speed of work, which we will use to deliver on objectives in fewer than the 90-day target, including, wherever possible, actions that can be implemented even more quickly.

## 2.0 Team Description

### 2.1 Our Approach to Our Teams

McKinsey operates as one integrated firm. We are a single partnership, united by a strong set of values, focused on client impact. Our firm is owned by over 2,400 partners who are spread across our offices, and while we have no headquarters in the traditional sense, our New York Office is the largest of our locations and we have been anchored here for 90 years. Underlying aspects to our approach include the following:

- **Our “One Firm” structure allows us to quickly deliver the right team with the right experience and expertise to every client, anywhere our help is needed.** In this “One Firm” model, we can pull in subject matter experts from around the globe, seamlessly providing resources from across our organization’s many practice areas (including, as relevant for this effort, Service Operations and Operations broadly, Customer Experience, and Housing). We are incentivized to solve our client’s toughest issues, with a uniquely collaborative environment where we bring in whatever resources are necessary to best meet clients’ needs. Our senior leaders and experts have full discretion to engage in client efforts wherever their help is needed, and our project teams are fully empowered to involve experts at any time. This makes the depth and breadth of our firm’s expertise literally a phone call or email away.
- **For this effort, we have thoughtfully selected key personnel who will bring the best answer to NYC – this includes deep experience working with the City; expertise on homelessness and housing-related topics; and leading capabilities in operations improvement, process optimization, customer experience, and design thinking.** Our team will be led by **Anthony Shorris**, who brings decades of experience with the City and will be accountable for delivering this effort. Together with Tony, we bring dedicated complementary leadership, including: **Linda Liu**, who has served the City for a decade on operational and crisis management efforts; **Dominic Williams**, who has 17+ years of experience in the public sector and extensive experience in NYC; **Maurice Obeid**, who brings expertise at the intersection of service operations, customer experience, and the public sector and has worked with over 40 City agencies to improve the City’s vital operations; and **James Hoey**, who serves public sector organizations on service operations transformations, including recently helping streamline the City’s nonprofit procurement processes. We are also partnering closely with **Kristen Misner-Gutierrez**, who is a preeminent leader in addressing homelessness in NYC, and **Raelyn Allen**, who brings expertise in housing programs and experience improving service delivery processes for vulnerable populations.
- **Our leaders are dedicated to serving NYC and will spend real time on the ground – both with the working team and with clients.** Our leadership supports the working team in multiple weekly problem-solving sessions, bringing relevant expertise on NYC, service operations, housing and human services, service operations, and customer experience design. This amounts to significant time spent guiding our teams at a very operational level to further refine and challenge findings and potential solutions. This involvement looks different at McKinsey compared to other firms—our average partner-to-working team ratio is 1:6 compared to 1:50 across many of our peers.
- **We are committed to supporting and encouraging participation by minority and women-owned businesses in the City.** We have long-established relationships with MWBE partners and also seek to develop new relationships. For this effort, we will be partnering with a women-owned firm, KMG Consulting (in the process of being certified), and Indelible, a minority-owned business certified in NYC, to provide the best team to NYC

on this critical effort. KMG Consulting is led by Kristin Misner-Gutierrez, who has a long history working in NYC government on homelessness and with HPD on homeless housing efforts. Indelible brings extensive experience assisting state and local governments, including the City, in developing strategies to navigate risk, optimize performance, and maximize the success of programs while remaining compliant with applicable regulations. In NYC, Indelible has assisted the Department of Health & Mental Hygiene (DOHMH) with its COVID-19 vaccination program and supported the NYC School Construction Authority's internal audit function relative to internal control design, implementation, and monitoring. Furthermore, we seek opportunity to further broaden and deepen our partnership with MWBE firms across the City, so that if there are other parties with whom to engage, we welcome the chance to do so.

- **We maintain a proactive, agile approach to staffing our teams and bringing in the resources required to address the City's needs.** Our staffing process enables us to quickly stand up teams and deploy additional resources to in-flight projects. We deploy a global staffing database – with our US colleagues numbering close to 10,000. We track our consultants' McKinsey work experience and expertise, professional work interests, strengths and development areas, language abilities, and tenure. Using a global staffing tool, we can quickly identify the best possible expertise across our firm as well as the latest project needs and consultants who are or will soon be available for assignment.

Below, we provide further details about our team structure, including the key personnel dedicated to supporting this effort and our plan to encourage participation of MWBE partners.

### Team Structure

We will staff a qualified team of key personnel, consultants, and experts who will support the City on this engagement. As described above, our team includes dedicated leadership and will also be made up of specialists in process optimization and operating model excellence, customer journey assessment, human-centered design, and operational lean management and effectiveness.

This team (highlighted below) represents the right mix of expertise, qualifications, and experience.

**Key Personnel:** Throughout the effort, our team will be led by **Anthony Shorris**, our Project Director, who will provide senior leadership, be accountable for the overall effort, coordinate McKinsey's entire team, and obtain necessary support and resources to ensure successful outcomes. Tony will be supported by a complementary set of senior colleagues who will bring cross-cutting City experience, as well as expertise in housing and functional areas such as customer service, operations excellence, and design. These key personnel include our team dedicated to NYC, including **Linda Liu** (cross-cutting city experience), **Dominic Williams** (NYC and housing expertise), **Maurice Obeid** (service operations, process optimization), **James Hoey** (service operations, end-to-end project management), **Kristin Misner-Gutierrez** (NYC and homelessness expertise), and **Raelyn Allen** (housing programs and process improvement expertise). Together, our key personnel will conduct five functions:

- Meet frequently with client executives to provide both individual and organizational counsel
- Lead or participate in meetings with HDC, HPD, the Project Team, and other key leadership and senior stakeholders
- Provide insight, problem-solving support, and quality management for the joint Project Team
- Ensure teams have access to the full complement of McKinsey's capabilities
- Spend all the time required to ensure high-impact, superior results for the City

As discussed above, our key personnel will include our partner at **KMG Consulting, Kristin Misner-Gutierrez**, who brings expertise on the topic of homelessness efforts in NYC, as well as our partner at **Indelible Solutions, Raelyn Allen**, who brings expertise on housing programs and process improvements both here in NYC and in Indelible's home state of Florida. They will join regular problem-solving sessions across workstreams to share expertise and ensure our working team develops robust potential housing placement process improvement options for City consideration that result in the best outcomes. Please see below for our plans for encouraging participation by MWBEs with further detail.

Our key personnel have both public and private sector expertise and are comprised of individuals who have worked seamlessly across these sectors. With McKinsey, public agency leadership will benefit from an experienced and agile industry partner that is trusted to solve some of the world's most challenging problems.

**Working Team:** Upon award, we will staff a Working Team that will be 100% dedicated to this effort for the duration of the project. Directed by the key personnel, this team will be responsible for working collaboratively with client team members to meet the City's objectives and to deliver the day-to-day work. These team members include:

- **Project Manager** who works closely with the Project Director to lead the day-to-day work with the Project team. The Project Manager will be responsible for directing the Associates, developing and managing the work plan, leading meetings and interviews, designing specific analyses, and synthesizing team findings into interim and final reports.
- **Associate** who will be responsible for conducting the day-to-day activities of the effort. Associates have proven capabilities and analytical skills to perform the tasks to which they are assigned. Under the guidance of the Project Manager and Project Director, they are responsible for analyzing data, conducting interviews, preparing draft documents, and presenting findings at client staff meetings.

**Experts:** As indicated above, our other senior leaders and experts have full discretion to engage in client efforts wherever their help is needed. Our project teams are fully empowered to involve experts at any time, making the depth and breadth of our firm's expertise literally a phone call or email away. For this effort, we will draw from experts on housing and homelessness, **Kunal Modi, Jennie Nevin, and Eufern Pan**, who have experience working on similar engagements across the country. We will also bring experts on specific topics related to public sector operations, process optimization, and customer experience from any of our 100 offices or 30+ functional service lines, as well as from our external network. **Jonathan Law** and **Becca Kleinstein** will contribute both their extensive experience working in NYC, as well as their expertise in operations and process optimization. As the leader of McKinsey's Customer Experience and Operations service line, Becca's core focus is in helping clients become more effective, efficient, and customer-centric via end-to-end operations transformation, including performance management, process optimization, capability building, and user-centered design. Partners **Sarah Tucker-Ray** and **David Hamilton** will also lend their expertise in public sector and operational excellence across multiple other cities and states.

**Support Staff:** We will also draw upon our internal research, logistical, and communications support staff, including research analysts, administrative assistants, and visual graphics designers.

### **Plans for Encouraging Participation by M/W/DBEs**

We are committed to and share the City's goals of advancing minority, women-owned, and disadvantaged businesses enterprises. For McKinsey, diversity and inclusion are critical to achieving our dual mission—to help our clients make substantial, lasting performance

improvements and to build a firm that attracts, develops, excites, and retains exceptional people and partners. To get the best answers for our clients, we require people with varied perspectives and backgrounds who feel comfortable sharing their views. For this reason, diversity and inclusion, including supplier and partnership diversity, is built into our day-to-day operations. Wherever possible, our policy and practice is to source and procure goods and services from small, minority-owned, woman-owned, veteran owned, and other diverse businesses.

In order to maintain this policy, McKinsey's procurement team manages the following core components of its supplier diversity program:

- **Outreach:** Conduct outreach efforts by joining and collaborating with various trade associations and attend business conferences/trade fairs to actively seek diverse suppliers.
- **Inclusion:** Ensure that diverse businesses have fair access to McKinsey bids when appropriate.
- **Development:** Work with diverse suppliers to ensure requirements and standards are clearly communicated and understood so that diversity suppliers are successful as McKinsey vendors.
- **Qualification:** Screen diverse suppliers to ascertain if a match exists between suppliers' capabilities and McKinsey's current and/or future needs and ensure that supplier has appropriate certification.

Further, to better ensure success, we believe it is important to have a local perspective on our engagements and are also committed to supporting the local economy and community wherever possible. To that end, we utilize members of our team to identify that we are working with the right local partners to deliver the best outcomes for our clients.



## 2.2 Proposed Team Members

Exhibit 1 summarizes the qualifications of our proposed team members.

Exhibit 1: Personnel mapping to content expertise and scope of work.

Proposed Team Members			Content Expertise							Phase Coverage <sup>1</sup>		
Name & McKinsey Title	Project Role	Years of Experience	NYC	Housing	Human Services	Operations	Process Optimization	CX, Design Thinking	Project Management	Current State Assessment	Prioritized Opportunities	Syndication & Communications
<b>KEY PERSONNEL</b>												
Anthony Shorris <i>Partner</i>	Project Director	30+	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Linda Liu <i>Partner</i>	Co-leader of NYC client service team (cross-cutting NYC experience)	15+	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Dominic Williams <i>Associate Partner</i>	Subject matter expert (NYC; housing experience)	15+	✓	✓	✓				✓		✓	✓
Maurice Obeid <i>Partner</i>	Co-leader of NYC client service (service ops, process optimization expert)	16+	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
James Hoey <i>Associate Partner</i>	Service Operations and Process Optimization expert	10+	✓		✓	✓	✓	✓	✓	✓	✓	✓
Kristin Misner-Gutierrez <i>President, KMG Consulting</i>	Independent consultant with public sector homeless and human services expertise in NYC	15+	✓	✓	✓	✓			✓	✓	✓	✓
Raelyn Allen <i>Project Manager, Indelible</i>	Housing programs and process improvement expert	11+	✓	✓	✓	✓	✓		✓	✓	✓	✓
<b>NYC AND OPERATIONS / PROCESS OPTIMIZATION</b>												
Jonathan Law <i>Sr. Partner</i>	Leader of Overall Relationship with City (cross-cutting NYC expertise)	20+	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

<sup>1</sup> See Section 4.0 (“Proposed Project Plan”) for details on proposed project breakdown into Phases. Phases align to Tasks 2-4 detailed in Section 1.0 (“Project Understanding and Approach”) as follows:

- Current State Assessment (Phase 1) aligns to Task 2
- Prioritized Opportunities for Improvement (Phase 2) aligns to Task 3
- Syndication & Communications (Phase 3) aligns to Task 4

Proposed Team Members			Content Expertise							Phase Coverage <sup>1</sup>		
Name & McKinsey Title	Project Role	Years of Experience	NYC	Housing	Human Services	Operations	Process Optimization	CX, Design Thinking	Project Management	Current State Assessment	Prioritized Opportunities	Syndication & Communications
Becca Kleinstein <i>Partner</i>	Customer Experience and Operations expert	15+	✓		✓	✓	✓	✓	✓	✓	✓	✓
<b>HOUSING / HOMELESSNESS</b>												
Kunal Modi <i>Partner</i>	Public Sector Customer Experience transformation expert with recent focus on homelessness	15+		✓	✓	✓	✓	✓	✓	✓	✓	✓
Jennie Nevin <i>Associate Partner</i>	Public Sector Operations and Program Design expert in housing, infra & transport	10+		✓	✓	✓	✓	✓	✓	✓	✓	✓
Eufern Pan <i>Project Manager</i>	Public Sector Service Delivery expert, leads efforts on homelessness	5+		✓	✓		✓		✓	✓	✓	✓
<b>OPERATIONS / PROCESS OPTIMIZATION</b>												
Sarah Tucker-Ray <i>Partner</i>	Public Sector User Experience expert	13+		✓	✓	✓	✓	✓	✓	✓	✓	✓
David Hamilton <i>Partner</i>	Operational Excellence expert	15+			✓	✓	✓	✓	✓	✓	✓	✓

## 2.3 Team Member Resumes

### 2.3.1 Anthony Shorris, Project Director, Former First Deputy Mayor and Executive Director

#### Key expertise and experience

- Focuses on support for state and local public sector agencies, cutting across wide swathe of topics
- 40+ years of relevant experience in the New York region, with deep organizational knowledge of all major City governmental operations
- Former Port Authority Executive Director and former First Deputy Mayor, former Deputy Director of the Office of Management and Budget, former NYC Commissioner of Finance, former Chief of Staff and Vice Dean of the New York University (NYU) Langone Health



Anthony Shorris is a McKinsey Partner who currently works with dozens of state and local public sector organizations and transportation agencies, nationally and globally. He played a central role in the transition support provided by McKinsey to the incoming Administration as well as guiding the substantial analytic work done for the NYC Economic Development Corporation (EDC) in support of the “New” New York Panel.

Prior to joining McKinsey, Tony served for four years as the First Deputy Mayor of NYC – with operating responsibility for its 375,000 employees and \$90B annual budget – where he led the development of its long-term strategic plan, OneNYC. At City Hall, Tony led the City’s efforts to end chronic veterans’ homelessness in New York, oversaw the re-organization of the HRA/DSS/DHS, and chaired the Administration’s homelessness working group for its first several years. Previously, he was the 11<sup>th</sup> Executive Director of the Port Authority of New York & New Jersey, the nation’s oldest transportation authority, having previously been its First Deputy Executive Director, in each case leading PANYNJ efforts in addressing the needs of people experiencing homelessness in its facilities. He has spent much of his public service career working to improve the operations of large governmental enterprises.

Tony serves or has served on several boards, including the Regional Plan Association (Executive Committee Member and NYC Co-Chair), the NYC Independent Budget Office, and the Second District Advisory Council of the Federal Reserve Bank of New York. He is a Visiting Professor of Public and International Affairs in the graduate program of Princeton University where he has taught courses on homelessness, poverty, and crisis management.

#### Education

Institution	Degree	Year
Princeton University	M.P.A., Domestic Policy	1979
Harvard University	A.B., Government	1977

#### Work History

Employer	Role	Years
McKinsey & Company	Partner	2018-present
Princeton University, School of Public and International Affairs	Weinberg Visiting Professor	2018-present
NYC	First Deputy Mayor	2014-2018

<b>Employer</b>	<b>Role</b>	<b>Years</b>
	Commissioner of Finance	1988-1989
	Director, Management Analysis, Department of General Services	1979-1982
NYU Langone Medical Center	Senior Vice President, Vice Dean, Chief of Staff	2010-2013
NYU Robert F. Wagner Graduate School of Public Service	Professor, Director, Rudin Center for Transportation Policy	2008-2010 1991-1995
Port Authority of New York & New Jersey	Executive Director First Deputy Executive Director	2007-2008 1991-1995
Woodrow Wilson School of Public and International Affairs	Professor, Director, Policy Research Institute for the Region	2003-2006
NYC Department of Education (DOE)	Deputy Chancellor, Operations and Policy	2001-2003
Healthfirst	Executive Vice President, Chief Operating Officer	1995-2001
HR&A	Partner	1990-1991
NYC OMB	Deputy Director Assistant Director	1984-1988 1982-1984

## 2.3.2 Linda Liu, Co-Leader of NYC Client Service

### Key expertise and experience

- Core member of McKinsey's Public Sector, Social Sector, and Risk Management Practices
- Core member of leadership team supporting NYC
- Experience in supporting clients in large scale organizational and operational assessments, strategic planning, enterprise risk management, and crisis response
- Expertise in regulatory remediation across multiple industries – financial services, advanced industries, consumer products



Linda Liu is a Partner in McKinsey's New York Office, where she is a core member of our Public Sector, Social Sector, and Risk practices. She focuses on strategic planning, operational resiliency, enterprise risk management, crisis response and preparedness, and transformations at scale. She has led multiple teams on organizational and operational assessments, including mapping current state organization and operating models; helping stakeholders define their desired target state, based on stakeholder input and needs; identifying gaps between the current and desired state; and helping organizations define the portfolio of initiatives to address gaps, including detailed implementation roadmaps.

Linda has been a core member of the client service team supporting NYC since 2015, when she served the City on its OneNYC 2015 strategic planning effort, again in 2019, as well as the City's COVID-19 response efforts. She led the McKinsey team to support the Adams administration in its transition in the fall of 2021. Beyond her dedication to the City, Linda has helped coordinate McKinsey's global response to COVID-19 and more recently, to global macroeconomic uncertainty. She has supported US state and local government clients, as well as private sector and international clients, to respond to the organizational and economic implications of this humanitarian crisis.

Linda is a member of the New York Office's Social Impact Committee, which oversees and guides our firm's social impact in the city, engaging with over 300 nonprofits in the past decade. She personally serves nonprofit organizations on topics such as strategic planning, operational assessments, and organizational enhancements.

Before McKinsey, Linda served a year in East Africa as a volunteer with TechnoServe, a nonprofit organization. While at TechnoServe, she worked on efforts with the Gates and Coca-Cola Foundations on small business entrepreneurship and food security.

### Relevant Experience

- **City of New York (H+H) – COVID-19 Contact Tracing, School Testing, and Vaccination Deployment Operational Support.** Led multiple teams to support the City on its COVID-19 response, working in close collaboration with third-party partners, DOHMH, NYC H+H, and other stakeholders. Linda directly supported the City on helping map, refine, and stress test its test-and-trace queuing process (which helped process >1.5M contacts); optimizing DOE school situation room processes including data process flow mapping, dashboard development and visualization, system requirements based on business needs and internal/external reporting requirements, and supporting cross-agency stakeholders, in codifying, identifying areas of improvement, and strengthening operational protocol. Other areas of support included conducting stress testing of vaccine demand, supply, and operational capacity; providing program management support; facilitating cross-team information transfer; providing regular reporting of key indicators; sharing cross-jurisdictional

practices; and conducting targeted analyses and troubleshooting, where appropriate, to inform the City's strategic approach, operational design and implementation.

- **Robin Hood Foundation – “New” New York Panel.** Co-led team that supported the co-Chairs of the Panel, Robin Hood Foundation, working in coordination with NYC EDC and New York State (NYS) ESD, to assess the current state of the economy and conduct targeted analyses (e.g., including return-to-office trends, transportation impacts, real estate analyses), facilitate input from over 50 panelists from across the business, labor, academic, nonprofit, and philanthropic sectors; and coalesce around core strategies to support economic recovery and resilience.
- **City of New York – Mayoral Transition.** Led team that supported multiple pillars of the transition team in identifying potential strategic initiatives that could inform the incoming administration's strategic priorities; managing critical stakeholders; and conducting targeted analyses. Workstreams included supporting the Housing, Human Services, and Economic and Workforce Development working teams.
- **Nonprofit Organization – Strategic Planning and Operations Review.** Supported the Board in renewing its strategic plan, including a review of the financial situation and operations & maintenance budget and resourcing. Engaged board members to align on strategic priorities and opportunities to enhance the financial resiliency of the organization.
- **City of New York – OneNYC 2015 and 2019 Strategic Planning.** Supported the City on its comprehensive strategic planning process and the roadmap to prepare the City for its fifth century. Topics included resiliency, sustainability, enterprise risk management, covering all domains including technology, education, public health, climate. Linda led a team supporting the City on overall project management, assessing challenges and opportunities facing the City, preparing regular briefings for City leadership, codifying their goals and strategic initiatives based on input from City agency-led working sessions, as well as proofing the final report for publication. For the 2015 iteration, Linda was the on the ground Project Manager, supporting stakeholder engagement with over 70 City agencies, 9K+ NYC residents, and other stakeholders to gather input regarding the City's visions, goals, and initiatives focusing on resilience, equity, growth, and sustainability.
- **US State – COVID-19 Crisis Response.** Established the operational apparatus to provide the state with near real-time situational awareness on testing, hospitalizations, and capacity. Support included helping develop stress testing planning scenarios to inform the state's operational planning; creating county- and region-level dashboards anchored by key indicators to help monitor the spread and evolution of the disease; providing cross-jurisdictional practices and lessons learned such as variants of concern and interest. Throughout the effort, Linda and her team incorporated knowledge transfer as part of the approach, including building capabilities of the client teams.
- **Top 10 US Financial Institution – Cross-functional Organization Transformation.** Led teams to support clients on cross-functional organizational and operational assessment of effectiveness; this included helping organizations articulate their “north-star” desired target state; building the fact base of the current state; identifying the delta between the target and current state, considering business needs and requirements. She helped build the transformation office overseeing the effort and helped to identify the set of potential initiatives that touched upon organization structure, performance management, strategic vendor management approach.
- **Multiple Fortune 500 Clients – Regulatory Remediation and Enterprise Risk Management.** Supported multiple Fortune 500 clients across sectors (including advanced industries, consumer, financial services) on development of action plans to address areas of regulatory concern. This has included, for example, establishing risk governance structure, enterprise risk management practices, incident management and response practices. Many of these efforts required review of current state practices and capabilities, gap assessment

against future state, identification and supporting the client in prioritization of initiatives, and implementation roadmap design and execution.

**Education**

<b>Institution</b>	<b>Degree</b>	<b>Year</b>
Yale Law School	J.D.	2013
Harvard University	B.A., Economics	2007

**Work History**

<b>Employer</b>	<b>Role</b>	<b>Years</b>
McKinsey & Company	Associate Partner	2014-present; 2007-2009
Cravath, Swaine & Moore LLP	Summer (Legal) Associate	2011, 2012
Sullivan & Cromwell LLP	Summer (Legal) Associate	2012
TechnoServe	Consultant	2009-2010
Harvard Medical School	Intern, Department of Microbiology and Immunobiology	2005

### 2.3.3 Dominic Williams, Subject Matter Expert, Former Chief Policy Advisor to the Mayor

#### Key expertise and experience

- 17+ years of experience in public sector, with extensive experience in NYC as well as supporting several presidential campaigns
- Specialty in social sector and public entities with a focus on city government, educational organizations, and nonprofits



Dominic Williams, an Associate Partner from McKinsey’s Public and Social Sector Practice, has a long record of public service with a focus on large scale strategy and implementation efforts.

Prior to joining McKinsey, Dom spent a decade serving in senior leadership roles in NYC government, most recently as Chief Policy Advisor, Director of Policy & Planning, and Chief Resilience Officer for the City. In that role, he oversaw the City’s sustainability agenda, leading development and engineering passage of the City’s landmark building decarbonization mandate and driving development and implementation of a \$2.8 B decarbonization effort for city-owned buildings.

Outside of NYC government, he served in key staff roles helping leaders on the national stage navigate the most complicated state, local, and regional challenges, as lead local government advisor to President-Elect Biden’s transition, as lead state and local policy advisor to President Barack Obama’s reelection, and as a pension and fiscal advisor to America’s largest private sector international labor union.

#### Relevant Experience

- **NYC / NYS Panel – Economic Development and Resilience:** Counseled a leading North American city and state collaborating on development of neighborhood revitalization strategies to increase use and flexibility the City’s downtown real estate, to increase economic opportunity, enhance the ability of owners to convert buildings to meet market needs, and invest in buildings to improve their energy efficiency and greenhouse gas performance.
- **State and Local Government – Economic Development and Resilience:** Counseled a leading North American city on development of post-pandemic economic development strategies to drive economic and fiscal recovery in the face of resident outmigration and nation-leading commercial vacancy challenges. Led assessment of current economic and competitive state of play, and analysis of fiscal risks from various economic outcomes. Identified key actionable levers in 5-year horizon to protect City revenue sources from economic trends and potential disruptors.
- **Banking Consortium – Sustainability:** Supported a consortium of financial institutions representing about 40% of global banking assets in the development of financial and operational pathways to decarbonization of heavy carbon emitting assets. Performed a landscape analysis of potential transactions, built a set of model transaction archetypes and analysis of success conditions, stakeholder outlook for each. Contributed to development of implementation plans for pilots of promising transaction forms.
- **NYC Nonprofit – Procurement:** Led development of a transformation program for a multi-billion-dollar human service procurement function for a leading North American city. Performed qualitative and quantitative assessment of current state process, mapping out end-to-end process journey for vendors, and identifying drivers of vendor pain and



procurement delay. Built business cases and implementation plans to support key initiatives to slash procurement timelines and raise vendor satisfaction.

- **State and Local Government – Implementation:** Built an implementation methodology to support effective and equitable deployment of over \$900 M in post-COVID Federal aid for the K-12 school system of a top-10 North American city. Performed data analysis of student achievement data to identify population disproportionately affected by COVID-driven learning loss, and not served by current services. Trained district leaders on initiative planning and metric creation and monitoring.

**Education**

Institution	Degree	Graduated
Princeton University	A.B., Philosophy	2005

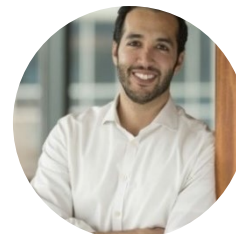
**Work History**

Employer	Role	Years
McKinsey & Company	Associate Partner	2021-present
Biden-Harris Transition	Intergovernmental Affairs Lead	2020-2021
Office of the Mayor of the City of New York	Chief Policy Advisor & Director of Mayor’s Office of Policy and Planning	2018-2020
	Chief of Staff to the First Deputy Mayor	2014-2017
Office of the Public Advocate for the City of New York	Chief of Staff and Deputy Public Advocate	2012-2013
	Deputy Advocate for Economic Policy	2010-2012
	Senior Policy Advisor	2010
Service Employees International Union	International Representative for Pension Strategies	2008-2010

## 2.3.4 Maurice Obeid, Leader of NYC Client Service, and Service Operations and Process Optimization Expert

### Key expertise and experience

- Leads service ops in the public sector
- Co-leader of McKinsey's client service to NYC, having worked across 3 NYC administrations
- 16+ years of experience in operations including with over 40 NYC agencies, supporting improvement of City's vital operations
- Leads McKinsey's Social Impact Committee which works with more than 600 nonprofits to support them with their missions Expertise in service operations, design thinking, customer experience, digital assessments, as well as change management



Maurice Obeid is a Partner in McKinsey's New York Office. Maurice has extensive experience enabling greater collaboration between private, public, and social entities, and brings to his work a deep appreciation for the inherent complexity of aligning disparate interests and objectives for the greater good of society. Across both the private and public sector, Maurice's functional area of expertise is service operations – creating step change improvements in operations including process and system changes, use of IT and technology, visualizations, change management, and performance management. Maurice also leads McKinsey's Social Impact Committee, working with nonprofits and other organizations to address the world's most pressing societal challenges. Maurice has worked with over 30 nonprofits in NYC and is a leader in NYC's LGBTQ+ community serving on multiple nonprofit boards that do vital work for the community.

### Relevant Experience

- **NYC – 911 Operations Transformation.** Designed and launched transformation of 911 operations for NYC, partnering with police, fire, and medical teams to conduct rapid organizational and operational assessment, as well as relevant performance driver assessment and analysis, which resulted in a set of initiatives that reduce response times to emergency incidents. This effort included mapping out current state operations as well as recommendations that would improve response time. We also stood up cross-agency governance across multiple agencies and launched "quick wins". Response times to life critical emergencies decreased by ~10%, a significant achievement for a high-performing emergency operation.
- **NYC Health and Hospitals – DOE COVID Testing Situation Room.** Supported H+H's role in the City DOE's Situation Room, which was established to monitor and manage the H+H and NYC DOE COVID-19 testing program. Supported the City in data process flow mapping, dashboard development and visualization, system requirements based on business needs and internal/external reporting requirements, and supporting cross-agency stakeholders, in codifying, identifying areas of improvement, and strengthening operational protocol.
- **NYC Health and Hospitals – COVID Vaccine Command Center (VCC) Support.** Led the support for NYC's VCC including reporting to inform the City's situational awareness, data visualization using backend data, conducting targeted analyses to inform the City's decision-making (e.g., scenario stress testing), and using analytical outputs to inform operational decision-making and support operational improvement (e.g., site-specific throughput, staffing modeling and capacity analysis).
- **NYC – OneNYC 2050.** Led strategic planning to develop a comprehensive long-term plan for NYC, which included a \$90B investment plan (and \$90B+ operating budget) to address some of the City's most vexing problems considering key priorities, costs, and risks. Worked

with City leadership and more than 30 agencies to understand the current landscape based on quantitative analyses, stakeholder input, and business needs, and codified the gaps between current state vs future state. Based on the current state assessment, developed a portfolio of initiatives including operational, organizational, and IT/digital investments across the City and prioritized initiatives based on business needs, cost and risk; mapped out resource and investment requirements for implementation planning.

- **NYC Health + Hospitals – Transformation.** Led a transformation effort with an aim to improve operations, finances, and quality of care for New Yorkers. McKinsey was engaged to conduct develop the vision and plan for the transformation through series of extensive and broad implementation planning and change management initiatives, held in the form of off-sites, and put in place general project management processes and systems to provide transparency and support accountability throughout the organization as part of the project management and beyond. The program entailed training and development of middle managers through modules delivered experientially throughout 3-month. Efforts resulted in aligning top management on the transformation strategy, improving operations, finances, organization and healthcare quality and enabled the acceleration of financial performance towards the FY17 target, allowing the City to exceed the \$778M target.
- **Top Five Federal Agency with 100M+ Customer Interactions (A) – Enterprise Operations (EO) and CX Transformation.** Conducted a rigorous diagnostic to identify opportunities, and then put in place a transformation plan to improve the effectiveness and efficiency of EO operations. Maurice led the team to quickly deliver impact by redesigning operational processes and workflows. The work leveraged several of our proprietary solutions (e.g., ‘Voice of the customer’ survey) to complete diagnostic work and recommend improvements in line what customers were seeing. The effort improved customer experience by increasing efficiencies by over 67% and reducing costs by more than 20%.
- **Top Five Federal Agency with 100M+ Customer Interactions (B) – Diagnostic and Customer Experience Transformation.** Accelerated the use of new technology at lower costs and with fewer problems that impact the customer experience by identifying additional opportunities for self-service and automation, and developing a new operating model that incorporates recommended process improvements. Maurice led the team in analyzing current state processes and information flows, re-envisioning the desired future state, and closing the gaps to implement. The team developed, fielded, and improved the highest Return on Investment (ROI) initiatives using rapid prototyping of potential solutions, and also developed agency-wide communications and change management campaigns to assist in user adoption.
- **Rethink Food – Operational optimization and scale-up.** Supported Rethink Food, a nonprofit addressing food insecurity, in its scale-up of operations over a 2-year partnership since April 2020. As part of the scale-up, Maurice and the McKinsey team studied customer needs and created a scalable digital model to support more through bespoke hyperlocal efforts (where restaurants support food insecure New Yorkers from same neighborhood). The work relied on process mapping and delivering recommendations of process, system, and capability building to improve service delivery and customer experience. Enabled a scale-up of operations by 10x to support 10M+ meals to hungry New Yorkers, a milestone achieved in 2023.
- **Vibrant Emotional Health – Designing and standing up 988 the nation’s first 3-digit mental health / suicide prevention hotline.** Supported Vibrant, the administrator of the National Suicide Prevention Lifeline, in its transition to the 3-digit number 988, a massive transformation and change management effort requiring a centralized transition team to manage the myriad of initiatives needed to enable a successful launch. Using McKinsey’s proprietary program management platform, the team helped align on a new organizational structure, accelerate hiring of key open roles, bolster network operations capacity and data

reporting between Vibrant and its federal partners, and initiate long-term organizational health initiatives to strengthen the company’s process, governance, and culture for its continued growth and resiliency post-launch. Vibrant successfully launched 988 in July of 2022, achieving and maintaining a 90%+ answer rate for ~100K contacts per week. Beyond 988, the team helped the organization to build their capabilities in preparation for the launch and to facilitate a redesign of their organization to best support 988 operations.

- **30+ NYC nonprofits – Supporting across wide variety of topics.** Worked with over 30 nonprofits across social services, mental health, food security, and education over the last 5 years. Example efforts: Led pro-bono engagements – ranging from economic development for Brooklyn to strategy for CEO-member nonprofit promoting social & economic discussions, to supporting workforce development and hunger nonprofits. Support areas included: operations, organization, strategy, IT/digital.

### Education

Institution	Degree	Year
Harvard University	M.P.P., Public Policy	2012
Harvard University	M.B.A.	2012
Massachusetts Institute of Technology (MIT)	B.S., Chemical and Biological Engineering	2007

### Work History

Employer	Role	Years
McKinsey & Company	Partner	2012-present; 2007-2009
Abraaj Capital	Associate	2011
Cue Ball Capital	Associate	2010

## 2.3.5 James Hoey, Service Operations and Process Optimization Expert

### Key expertise and experience

- Core member of McKinsey's Public Sector and Service Operations Practices
- Experience supporting US federal, state, and local governments to simplify complex processes and improve service delivery operations
- Expertise across all phases of operations transformations, from diagnostic to implementation



James Hoey is an Associate Partner in McKinsey's New Jersey Office who is passionate about helping public sector clients improve their ability to deliver services to constituents. James has supported US federal, state, and local governments on topics that range from vaccine delivery, claims processing and benefits delivery, and call center operations. He recently worked with leaders across NYC's human service agencies to help the City rethink its procurement processes and operations. Prior to McKinsey, James worked for several years as a complex litigation attorney where he honed his ability to dive deep into details while being communicating the big picture.

### Relevant Experience

- **NYC Mayors Office of Contract Services (MOCS) – Accelerating nonprofits contracting and payments.** Helped NYC streamline its procurement processes to deliver a faster, simpler contracting and payments experience for nonprofits. He interviewed dozens agency leaders; analyzed PASSPort data on contracting volumes, steps, and timelines; facilitated multiple focus groups for 50+ nonprofit leaders; and launched Journey Pulse Survey with responses from 1,500+ nonprofit leaders. Using these inputs, James and his team helped the City identify dozens of opportunities to simplify and improve processes, leading to a roadmap with 26 details initiatives and major changes implemented even before the assessment concluded.
- **Top Five Federal Agency with 100M+ Customer Interactions.** Led multiple teams in support of an agency working to modernize its claims processing and customer support functions. Work included helping the agency develop a long-term transformation plan, running a detailed diagnostics on different aspects of their current state operations, and leading a daily command center focused on ensuring effective and responsive service delivery.
- **US State – Rapid COVID-19 Emergency Response.** Oversaw multiple teams supporting a state on its strategic, operational, organizational, and consumer-facing emergency response to the COVID-19 pandemic. Areas of focus included providing data and analytics support to enable data-driven decisions, operational logistics from testing to vaccines, helping to stand up and scale contact tracing operation, and supporting public engagement to ensure timely, accurate, and accessible information.
- **National Health Insurance Company – Customer Experience Transformation.** Helped a leading health insurance company establish a new organizational structure and operating model, centered around customer journeys. The organization wanted to transform the way it did business to ensure a deep understanding of customer experience was at the center of product development. To support this transition, James helped deliver a thorough mapping of existing customer journeys and stand up an agile product development model to deliver against those journeys. The team worked with senior leaders at the company to define the

overall scope and goals of the transformation program, build the playbook for implementing agile methodologies, establish the program office, and launch the first journey teams.

### Education

Institution	Degree	Year
University of Chicago Law School	J.D.	2012
University of Chicago Divinity School	M.A., Religion and Ethics	2009
Wheaton College	B.A., Philosophy	2007

### Work History

Employer	Role	Years
McKinsey & Company	Associate Partner	2018-present
Fishkin Lucks LLP	Attorney, Litigation	2016-2017
Cascino Vaughan Law Offices LTD	Attorney, Litigation	2012-2015

## 2.3.6 Kristin Misner-Gutierrez, Independent Consultant at KMG Consulting, Homelessness and Human Services Expert

### Key expertise and experience

- Social services expertise in strategic planning, policy innovation, government relations, and homelessness
- 20 years of experience working in government health and human services and with nonprofits
- Former Deputy Commissioner for Supportive and Affordable Housing and Services for NYC, NYC Director of Social Services and Chief of Staff to the NYC Deputy Mayor of Health and Human Services



Kristin Misner-Gutierrez started her own consulting practice, KMG Consulting, after spending over 15 years in high level government roles in NYC. Her consulting practice has provided national strategic planning support on homeless efforts, nonprofit startup, policy making, and government relations. She is a contributing writer and editor to the Book, “How Ten Global Cities Take on Homelessness: Innovations that Work,” released in March 2021 and she served as the Washington State Director of Operations during a 2020 presidential campaign.

Prior to consulting, she was the Deputy Commissioner for Supportive and Affordable Housing & Services at the NYC HRA. In that role, she was responsible for developing a continuum of housing options for homeless single adults and families, including supporting the implementation of the mayor’s plan to create 15,000 units of supportive housing.

She also worked in the NYC Mayor’s Office for over a decade where she served as the Director of Social Services for the Deputy Mayor for Health and Human Services in the de Blasio administration and Chief of Staff to the Deputy Mayor for Health and Human Services in the Bloomberg administration. She has played a major role advancing important mayoral initiatives on issues ranging from homelessness to criminal justice, senior services, child welfare and workforce development. She was one of the primary architects of the nation’s first Social Impact Bond to break the cycle of incarceration for youth. She oversaw the launch of the Age-Friendly NYC Plan, coordinated the creation of the Mayor’s Office of Workforce Development, and supported NYC’s successful submission to end chronic veteran homelessness. Kristin also worked at the DHS where she supported efforts to reform the intake process for homeless families.

### Education

Institution	Degree	Year
NYU Wager School of Public Service	Master of Public Administration in Non-for-Profit Management. Specialization in Public Policy	2008
College of the Holy Cross	Bachelor of Arts in English	2001

### Work History

Employer	Role	Years
KMG Consulting (Self-Employed)	Principal Consultant	2019 – present
NYC DSS/HRA	Deputy Commissioner for Supportive and Affordable Housing and Services	2016-2018

<b>Employer</b>	<b>Role</b>	<b>Years</b>
NYC Mayor's Office	Director of Social Services Chief of Staff to the Deputy Mayor for Health and Human Services Senior Advisor to the Deputy Mayor for Health and Human Services	2006-2016
NYC DHS	Special Assistant to the Commissioner	2003-2005



## 2.3.7 Raelyn Allen, Project Manager at Indelible, Housing Programs and Process Improvement Expert

### Key expertise and experience

- Strategic Grant Management leader and project driver who rapidly assimilates to complex policies and eligibility requirements across diverse funding streams, and grasps grant and contract nuances to maximize funding, streamline processes, and increase successful outcomes.
- Experience implementing and managing diverse housing programs working collaboratively with federal, state, local, and private stakeholders across transitional, supportive, and permanent housing initiatives.



Raelyn Allen is a Manager at Indelible Solutions and showcases 11+ years’ experience in the housing, community development, and disaster recovery industries. Ms. Allen has partnered with multifaceted stakeholder to surface needs, educate on program rules and regulations, and remove bottlenecks in a variety of housing programs to optimize processes and outputs. In NYC, Raelyn served as a Senior Grant Writer at The Doe Fund and designed and funded transitional, supportive, and permanent housing programs for homeless and formerly incarcerated men as well as homeless individuals with HIV/AIDS. In Rochester, NY, she wrote and managed the grant funding processes Sojourner Home, a women’s homeless and domestic violence shelter and Wilson Commencement Park, transitional housing for single mothers. Ms. Allen has navigated housing programs/projects across local, state, and federal agencies including Housing and Urban Development (HUD), SSVF, VA, Department of Labor (DOL), CDBG-DR, Federal Emergency Management Agency (FEMA), and USDA-RD.

### Relevant Experience

- **NYC – OMB.** Reviewed cost allocation plans for NYC. Performed financial analysis of city cost plans and internal service funds. Provided recommendations on cost allocations and procedural updates.
- **NYS – Supportive Services for Veteran Families.** Served as the contract manager for four years on a Rapid-Rehousing program in Genesee, Livingston, Erie, and Niagara Counties.
- **Florida – DEO.** Served as the workstream leader in a review of revenue sources, uses, restrictions, utilization, and management across Florida’s DEO.

### Education

Institution	Degree	Year
West Virginia University	B.A., History and Women’s Studies	2008
State University at Buffalo	M.A., History	2010

### Work History

Employer	Role	Years
Indelible Solutions	Manager	2023 - Present
Greenkey Resources	Sr. Managing Consultant for Guidehouse	2022
Hagerty Consulting	Associate Manager	2021
The Doe Fund	Senior Grant Writer	2019 - 2022

<b>Employer</b>	<b>Role</b>	<b>Years</b>
MBO Partners	Manager for KPMG	2019 - 2021
PathStone Corporation	Deputy of Housing Grants and Programs	2013 - 2019

## 2.3.8 Jonathan Law, Accountable Leader of Overall Relationship with City

### Key expertise and experience

- Co-leader of McKinsey's client service to NYC
- Founding member of McKinsey's US State and Local Government Practice and member of McKinsey's Global Cities Practice
- Expertise in requirements development, operational assessments, strategic planning, organizational development, project management, implementation planning, and stakeholder engagement
- Extensive experience serving NYC (e.g., COVID-19 Response, OneNYC); formerly a Project Manager at NYCEDC



Jonathan Law is a Senior Partner with McKinsey who co-leads the firm's relationship with NYC and a core member of the State and Local Government Practice. Jon has worked with clients at the state and local levels, acting as a thought partner with senior leaders in organizations on matters of IT strategic planning, requirements analysis, Business Process Improvement, innovative application of data analytics, organizational design, Customer/Resident Experience Design, and change management. His work has covered a range of transformation, strategy, organizational, and performance management improvement issues.

### Relevant Experience

- **City of New York (H+H) – COVID-19 Contact Tracing, School Testing, and Vaccination Deployment Operational Support.** From May 2020 to May 2022, Jon helped oversee our support to the City in its COVID-19 response, leading multiple teams to support NYC DOHMH, NYC H+H, and other City stakeholders. Support included conducting stress testing of vaccine demand, supply, and operational capacity; sharing cross-jurisdictional practices; and conducting targeted analyses and troubleshooting, where appropriate, to inform the City's strategic approach, operational design and implementation.
- **City of New York – Mayoral Transition.** Led team that supported multiple pillars of the transition team in identifying potential strategic initiatives that could inform the incoming administration's strategic priorities; managing critical stakeholders (over 100 across pillars); and conducting targeted analyses.
- **NYC – One New York: The Plan for a Strong and Just City.** Led the development of OneNYC, the comprehensive development of strategic plans to define the roadmap to prepare NYC for its fifth century. Building off previous PlaNYC efforts, the OneNYC plan identified the core challenges and opportunities facing NYC, including its growing population; the City's significant infrastructure needs; an evolving economy; urban environmental conditions and climate change; growing inequality; the importance of the broader region; and the incorporation of the voices of New Yorkers in the planning process. Supported the setting of specific goals and targets and development of over 200 initiatives. In developing the plan, executed a robust stakeholder management and requirements gathering plan, including canvassing the opinions of over 9,000 New Yorkers and engaging over 125 representatives from over 70 City agencies.
- **NYS – Superstorm Sandy Housing Recovery.** Led a team to support the State in designing and standing up a housing recovery programs in the wake of Superstorm Sandy, which left 20,000 affected property owners in need of assistance. The team worked with the State to develop optimized process maps for the two major components of the housing program process, case management and construction management, identifying estimated

“throughput” time for an applicant to pass through the process, clear owners for each step, and appropriate “service level” targets. The team supported the State in deploying \$1B+ in aid to more than 11,000 homeowners, as well as identifying 30% in delivery cost savings and using a highly flexible process design.

- **NYC – Assessment of for-hire-vehicle regulation through cost effectiveness and cost benefit analysis, as well as requirements gathering.** NYC wanted support in assessing how proposed regulatory changes of the for-hire vehicle market in NYC would affect the City’s interests, particularly around equality and congestion reduction. The City engaged McKinsey to assist in defining the current state and projecting consequences of different regulatory regimes. The team assisted the City in defining and quantifying its priorities, including congestion, equity, economic development, environmental quality, and accessibility and projected the impact of different regulatory regimes on each of these variables, ultimately helping the City to decide on its path forward.

### Education

Institution	Degree	Year
Columbia University Law School	J.D.	2007
Harvard University	B.A., Social Studies, magna cum laude	2001

### Work History

Employer	Role	Years
McKinsey & Company	Partner	2007-present 2001-2003
NYCEDC	Project Manager	2004
United Nations	Associate Program Officer	2003-2004

## 2.3.9 Becca Kleinstein, Customer Experience and Operations Expert

### Key expertise and experience

- 15+ years expertise streamlining business processes and simplifying customer and user journeys via sentiment/experience surveys, observations, and in-depth interviews
- Leader of McKinsey's Customer Experience and Operations service line
- Served NYC since 2020 as Engagement Director on implementation/strategy for its Contact Tracing and School Testing & Reporting ("SitRoom") programs, including project management, process design, and staff capability building



Becca Kleinstein is a Partner in McKinsey's Stamford Office with experience helping public, social, and private sector organizations achieve excellence in strategy, operations, and customer experience. She has worked with US federal, state, and local governments. She is a proven leader with a passion for creating simple and intuitive digital experiences for private citizens and government employees. Becca's expertise is in helping clients become more effective, efficient, and customer-centric via end-to-end operations transformation, including performance management, process optimization, capability building and user-centered design.

### Relevant Experience

- **City of New York (H+H) – COVID-19 Contact Tracing Operational Support.** Becca led the overall day-to-day project delivery to support the City on its COVID-19 response to stand up, scale, and sustain its contract-tracing operations, working in close collaboration with third-party partners, DOHMH, NYC H+H, and other stakeholders. Work included clean-sheeting process flows, designing the customer experience of contact tracing (user experience/user interface), developing performance management infrastructure via integrated dashboards, and overall project management (10+ parallel workstreams across 30+ senior stakeholders). Additionally, Becca led the McKinsey team to conduct capability building of both frontline contact tracers and NYC staff, and developed a full knowledge transfer infrastructure, including codifying 'lessons learned' and a compendium of artifacts, a series of working sessions, and setting up overall governance and processes.
- **City of New York (H+H) – School Testing & Reporting.** Becca led the overall day-to-day project delivery to support the City in implementing the nation's largest school testing programs ~1.5M tests in the 2020-2021 school year across >4k schools). Becca supported the City in standing up the School Reopening "SitRoom" in ~ 4 weeks, including process flow mapping, training, and workforce management planning. Additionally, Becca's team stood up an interagency connection process, including weekly ops and process management meetings as well as a reporting function to synthesize daily updates on program level metrics, trends, and implications to NYC leadership. Additionally, she led the support of capability building of the City data team to conduct City and State reporting, collaborated on developing improved data visualizations, and fully transitioned capabilities to the City.
- **National insurance company – Procurement Operating Model Redesign.** Led a procurement operating model (organizational structure, process and technology) redesign program to enhance their operations while substantially reducing their cost base by 10%. Conducted a diagnostic on the full procurement function, including baselining capabilities, mindsets and culture, performance management, roles and responsibilities, and enabling systems. Based on baseline, designed future state operating model, including revised

organizational chart, roles and responsibilities, and cross-functional processes. Additionally, based on capability gaps, developed a procurement capability building program.

- **US Federal Agency – Customer Experience Technology Roadmap.** Designed an automation, self-service, and customer experience roadmap for a public sector Federal agency IT helpdesk. Conducted a current state assessment including deploying McKinsey’s Journey Pulse to map customer journeys and current state pain points, and analytically baselining areas of opportunity. Conducted a series of design sprints (cross-functional workshops) ideate on the future state customer experience including process redesign, self-serve functionality, and identifying quick wins. Developed an implementation project plan, including resources required, cross-functional governance processes, and capabilities needed.

**Education**

Institution	Degree	Year
University of Pennsylvania	M.B.A.	2012
NYU	B.S.	2005

**Work History**

Employer	Role	Years
McKinsey & Company	Partner	2013-present
Unilever	Associate Brand Manager	2005-2010

## 2.3.10 Kunal Modi, Public Sector Customer Experience Transformation Expert With Recent Focus on Homelessness

### Key expertise and experience

- Partner in the San Francisco office of McKinsey & Company
- Leader in the Firm's Public Sector Practice
- Leads digital, operational, and customer experience transformations for governments and mission-driven private sector organizations



Kunal Modi is a Partner in the San Francisco office of McKinsey & Company and a leader in the Firm's Public Sector Practice. Kunal's expertise includes stewarding digital, operational, customer experience transformations for public agencies. Kunal also leads regional economic development and municipal services improvement efforts. Kunal serves federal, state, and local governments, in the United States and globally, to improve service delivery, better meet missions, and promote economic opportunities. He is also experienced in guiding mission-driven companies, not for profits, and philanthropies in developing strategies and improving operations using a customer experience and design approach. Kunal also advises financial institutions and investors on identifying and scaling technology solutions that can drive public impact.

Kunal leads community service efforts for McKinsey's Bay Area office and is a leader of our global social responsibility initiative. Before joining McKinsey, he was an AmeriCorps VISTA national service member and worked across the public and social sector. He is on the board of Generation Citizen, a national youth civic education not-for-profit organization, and Larkin Street Youth Services, a Bay Area not-for-profit dedicated to ending youth homelessness.

### Relevant Experience

- **Led customer experience and operational transformation for Driver's Services agency in Western US State.** The effort included a rapid diagnostic of existing operational data, deep customer and field research, and process mapping to identify and execute operational improvement levers and design new processes and digital tools for front line staff.
- **Created a new digital one-stop-shop for small business permitting by coordinating multiple agencies in Western US State.** The effort included conducting a technology platform assessment, aligning the permitting processes and data across multiple agencies, and designing a new external interface based on input from local businesses.
- **Stewarded regional economic development effort in a major State region** to align key members of the region's civic, community, and business leadership around a shared 10-year vision of economic growth and develop a community investment plan made up of a portfolio investible initiatives.
- **Mobilized a multi-county coalition to tackle homelessness and affordable housing** by developing new data insights to better inform the work of civic leaders and service providers.
- **Served Mayors' Offices across US** on efforts including improving city-wide hiring practices, streamlining permitting process for large scale events and festivals, improving 911 call center operations, and capture better data on homelessness and envision solutions.

### Education

Institution	Degree	Year
Northwestern University	B.A. in Economics and Political Science	2006
Harvard Kennedy School	Masters in Public Policy	2013
Harvard Business School	M.B.A.	2013

### Work History

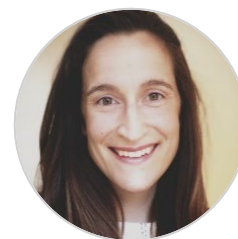
Employer	Role	Years
McKinsey & Company	Partner	2007-2009, 2013- Current
AmeriCorps*VISTA	National Service member	2006-2007



## 2.3.11 Jennie Nevin, Public Sector Operations and Program Design Expert in Housing, Infra & Transport

### Key expertise and experience

- Associate Partner in McKinsey's Boston Office
- Leader of multiple engagements with government agencies in implementing billion-dollar programs, from grants to capital and infrastructure projects, with a focus on user experience
- Over a decade of experience working in the public sector in economic development and public infrastructure



Jennie Nevin is an Associate Partner with McKinsey & Company's Boston Office with deep expertise in public sector operations and program design, particularly for large infrastructure and grant projects. She joined McKinsey in 2017 after completing her M.B.A. and has over 10 years of experience working within and alongside public sector agencies to help make data-driven, holistic improvements in how they serve users, particularly in economic development, housing, infrastructure, and transportation. At McKinsey, Jennie has also served several public finance agencies through complex organizational changes impacting workforce and operations. She specializes in technical assistance for states and has worked in 5+ state and local governments in the last 3 years helping to implement large scale initiatives.

### Relevant Experience

- **City of New York – Mayoral Transition – affordable housing:** Supported the new administration on building the fact base on affordable housing in the city, best practice research, data and analysis, and research on potential interventions to support greater access to affordable housing.
- **Large Foundation – affordable housing strategy:** Worked with a large philanthropic foundation to set a strategy for increasing access to affordable homeownership for Black, Indigenous, and People of Color (BIPOC) families, including building renter equity and preserving wealth and equity.
- **Affordable housing nonprofit developer – board strategy:** Supported the board of a major nonprofit affordable housing developer and think tank on its affordable housing strategy, including researching potential levers to pursue, building fact packs on the current state of housing in the US, and tracking critical trends that informed the thinking on interventions.
- **State Department of Administration – housing grant program design:** Led the design of the implementation of a \$10B federal program for homeowner relief within a large state, using data to drive analytical decision-making, structuring critical decisions to be made, assisting with stakeholder management, and coordinating with other states and with local community institutions on program design decisions.
- **State Department of Housing – housing relief program design:** Assisted a large state in standing up a local program for its portion of the ~\$50B federal COVID-19 rental assistance, including forecasting demand, helping design programs for renters using analytics, and supporting stakeholder communications and capacity-building, including metrics and tracking.
- **Secondary Mortgage Market provider – operations:** Supported a large public finance organization in designing and executing operational transformations affecting the workforce, including implementing new Agile ways of working to better serve its mission of driving housing and homeownership affordability.

- **State Office of Health and Human Services – COVID-19 response:** Worked with a large state for >2 years on COVID-19 response, including detailed analytics and dashboards, process management, and data-driven decision-making across topics ranging from vaccine rollout to therapeutics.
- **Large state DOT – workforce modeling and talent system design:** Led a team of infrastructure experts and data scientists in a workforce analytics project that used machine learning to predict the skills and talent needed to deliver on critical infrastructure projects across highways, bridges, and tunnels based on demand. Also highlighted talent gaps and opportunities to unlock value by enhancing the talent management system and improving recruiting, internal organization of workforce, and learning and development.
- **Top 5 transit system – workforce modeling:** Developed predictive models to inform the hiring of the workforce required to deliver an ambitious multi-billion-dollar capital program; led a team of experts to debottleneck internal processes to facilitate spend, and worked with HR to streamline hiring. Supported through the initial transition to remote work during COVID-19.
- **Top 5 transit system – COVID-19 impact modeling:** Worked with the largest mass transit system in the country in understanding the impact of COVID-19 on potential revenues and operations, including modeling the benefits of stimulus funds for economic development and job creation in the region and the potential impact on the workforce.
- **Large School System –** Led the collection and analysis of data to understand and visualize the current state of educational models in COVID-19 across all districts in a large school system, specifically on remote learning practices and the balance of time spent in different learning models, to inform updates to learning requirements for students in K-12.
- **Economic development and job growth –** In large county, a jurisdiction larger than six states, supported multiple economic development initiatives to create jobs and grow the commercial tax base. Modeled economic impacts, supported projects through entitlement and permitting, and led the implementation of community benefits agreements to bring jobs and business opportunities to the workforce.

## Education

Institution	Degree	Year
Harvard University	M.B.A.	2017
Yale University	B.A., Religious Studies	2010

## Work History

Employer	Role	Years
McKinsey & Company	Associate Partner	2017-present
Prince George’s County, MD, Office of the County Executive	Chief of Staff for Economic Development and Public Infrastructure	2014-2015
Prince George’s County, MD, Office of the County Executive	Business and Operations Analyst	2011-2014
Prince George’s County, MD, Office of the County Executive	Legislative Aide and Speechwriter	2010-2011

## 2.3.12 Eufern Pan, Public Sector Service Delivery Expert, Leads Efforts on Homelessness

### Key expertise and experience

- Provides support for state and local public sector agencies
- Expertise in homelessness response in the Bay Area, including supporting nonprofits on strategic planning, operational assessments, and organizational enhancements
- Supported state-level COVID-19 crisis response and recovery planning



Eufern Pan is a Project Manager with McKinsey based in the Bay Area office. She leads McKinsey's pro-bono efforts addressing homelessness in the Bay Area and across the United States. Eufern serves state and local governments on improving service delivery and provides expert advice to nonprofits to accelerate their strategic planning, organizational health, and implementation efforts. Eufern was born and raised in Malaysia, received a B.A. in Political Science and Dance from Duke University and an M.B.A. from Harvard Business School, and was previously based in McKinsey's Atlanta and Tokyo offices. She is also a leader of the San Francisco office's Community Service team and oversees various local social responsibility efforts.

### Relevant Experience

- **Regional Homelessness Response Nonprofit Organization - Capability Building.** Eufern led a team that supported a regional homelessness response nonprofit on codifying the enablers of a successful homelessness reduction strategy and partnering with stakeholders in one pilot county to use the framework to drive action. She and her team developed implementation toolkits to enable the nonprofit and its stakeholders to monitor and deliver against priority initiatives.
- **Local Homeless Services Nonprofit Organization - Strategic Planning, Operational Design, and Implementation.** Eufern led a team that supported a local homeless services nonprofit in expanding services to women and children. She and her team deeply engaged with client leadership to understand the landscape of women experiencing homelessness or at risk of homelessness in the city and mapped the customer journey and continuum of care needed to fulfill potential unmet needs of core women segments. Her team supported senior leadership to align on the organization's priority focus areas for women, conducted gap assessments and developed the implementation roadmap for successful execution of strategic initiatives.
- **Local Homeless Services Coalition (Nonprofit Organization) - Five-Year Strategic Planning.** Eufern led a team that supported a local homeless services coalition in developing the city's plan of ending transgender homelessness. She and her team supported client leadership to build an analytical fact base on unique needs of transgender and non-conforming (TGNC) individuals experiencing homelessness, an ecosystem scan of transgender-focused service providers and operational gap assessments. She and her team supported senior leadership to define the vision, governance and strategic initiatives of a city-wide pilot program that included expanding and improving access for the TGNC community to housing, healthcare, employability and legal services.

- **US State - COVID-19 School Testing.** Eufern led a team to support the state on its COVID-19 response at K-12 schools, working in close collaboration with third-party partners, DPH, and other stakeholders. Support included analyzing testing demand, supply, and operational capacity; providing program management support; facilitating cross-team information transfer; providing regular reporting of key indicators; conducting targeted analyses and troubleshooting, where appropriate. Eufern and her team incorporated knowledge transfer as part of the approach, including building capabilities of the client teams.

**Education**

Institution	Degree	Year
Harvard University	M.B.A	2021
Duke University	B.A., Political Science and Dance	2017

**Work History**

Employer	Role	Years
McKinsey & Company	Project Manager	2021-present 2017-2019
CrossBoundary	Summer Associate	2020
Savor Health	M.B.A. Summer Intern	2020
Accenture	Strategy Intern	2016

### 2.3.13 Sarah Tucker-Ray, Public Sector User Experience Expert

#### Key expertise and experience

- Leader in the Public Sector Practice with a focus on helping governments develop strategy and make their role in the economy more effective and efficient.
- Co-leader of McKinsey's Public Sector User Experience service line.
- 13+ years of relevant experience.
- Work includes economic development, infrastructure investments, and the relationship between government and the private sector.
- Worked at the White House on urban economic development, in addition to prior work experience in three US federal government agencies and two city governments.



Sarah Tucker-Ray is a Partner and leader in McKinsey's Public Sector Practice, who serves federal, state, and local government leaders to develop strategies and improve operations. She has helped organizations conduct strategic reviews of their organizational structure, operating model, budget, and IT, and then design and deliver major change programs to achieve increases in effectiveness and efficiency. She founded and leads McKinsey's Public Sector Customer Experience Service Line, helping bring the best of private sector human-centered design and user research to improve government processes and programs. She also leads McKinsey's Service Operations Practice for Public and Social Sector Organizations.

Prior to joining McKinsey, Sarah held federal and local government roles focused on promoting economic opportunity and improving government operations. She also served as the finance chair and a founding board member for a public charter school in Brooklyn, New York, and consulted with not-for-profit organizations on economic development. She is an ongoing leader of our service to New Jersey, including on the Stronger and Fairer Plan and every project with NJEDA.

#### Selected Relevant Experience

- **State A – Economic Analysis and Development.** Supported a state in developing a deep dive diagnostic analysis of the economy. This work involved generating ideas for initiatives to improve the state's economic performance, building on research into other states and industries and focusing on the life science, clean energy, high tech, and logistics industries. She then led the team who implemented the plan, including pitch pack development and sub-sector prioritization, support for an overseas trade mission, development of business plans for specific investments, and creation of post-COVID economic relief programs.
- **US Federal Agency – Role of Government in the Economy.** Supported a US federal agency to redefine its engagement with the private sector and to develop a strategy regarding new investments, divestments, and new operating models. Strategy included a due diligence phase covering the market relevant to the agency's mission, exploring both the current and future demand for products and services and current and future supplier offerings to meet that demand (technologies, services). The work built scenarios for how the market could develop and the likely effects of different scenarios on the agency's mission. Based on this scenario analysis, a set of initiatives was developed, including investments in technologies of high potential value but currently commercially nonviable, divestments of activities more efficiently done by the private sector, and a set of new roles to consider, including quality regulation and subsidies for equitable provision, to be weighed against the current state of direct service provision by the government.

- **State B – Economic Development Agency Economic Development Strategy.** Worked with a state’s economic development agency on a broad and ambitious economic development strategy. The state sought to return to the top 10 US states for job growth, implying 45,000 new jobs per year for 10 years over projections. McKinsey’s work included a roadmap for job creation and support for the State in putting together a bid to attract a large, multi-billion-dollar investment. Developed a portfolio of talent initiatives in partnership with major universities to strengthen the State’s workforce. Engaged and generated alignment of 50+ stakeholders throughout all phases of the work.
- **State C – Economic Development Strategic Plan, Incentive Program Redesign, and Investment Attraction Strategy.** Advised a council of CEOs from the fastest growing State in the US on a strategy for sustainable growth. Prepared a competitive assessment of the state’s economy, a list of prioritized sectors resilient to shocks, a human capital strategy, a plan to redesign its incentives program, and a web-based application that measures the ROI of State incentives. The final deliverables included six strategies, 20 policy options, and 75 initiatives.
- **National Government – Economic Development.** Supported a national government in development of an economic development plan, including six sectors to target (including manufacturing, tourism and real estate) and recommendations on necessary enablers, including workforce development, energy, and capital investments. Resultant changes include a redesigned investment promotion authority, a MOU with major investors, a major new tourism deal worth \$200M+, and a sale of an underperforming asset.

## Education

Institution	Degree	Year
Princeton University	MPA, Economics, Urban Policy and Planning	2013
Tulane University	B.A., Political Science, Public Policy	2009

## Work History

Employer	Title	Years
McKinsey & Company	Partner	2013-present
Princeton University	Lecturer	2013
US Department of Education	Fellow	2012
White House Domestic Policy Council	Team Lead – Strong Cities, Strong Communities	2011-2012
US Department of HUD	Special Assistant, Office of the Secretary	2010-2011
US Department of Health and Human Services	Fellow, Administration for Children and Families	2009

## 2.3.14 David Hamilton, Operational Excellence Expert

### Key expertise and experience

- Partner in the Detroit office of McKinsey & Company
- Leader in the Firm's Operations Practice
- Leads operational and technology transformations for mission-driven organizations



David Hamilton is a Partner in the Detroit office of McKinsey & Company and a leader in the Firm's Operations Practice. David's expertise is in helping leaders evolve how organizations are run, with operational excellence. He helps clients bring technology and operational excellence together to create value - preserving or recommitting to the basics of operational excellence, expanding their toolkits, and using them to accelerate end-to-end value stream transformation. Many times, this includes evolving lean management systems to include integrated, at-scale approaches to digital and analytics and fundamental customer experience overhauls.

David has served clients across many sectors, some of which include advanced industries, financial services, and the public sector. David has held many leadership roles within McKinsey's North American Operations Practice, currently convening efforts on Operational Excellence.

David has led several efforts within the Michigan and Detroit communities focused on improving lives and livelihoods including economic development, workforce development—such as upskilling and reskilling—education, support for small and medium sized businesses, and efforts related to equity.

He attended the University of Michigan where he studied industrial and operations engineering. Upon graduation, David joined McKinsey's Operations Practice in Los Angeles. He went to business school at Northwestern University's Kellogg School of Management, and then rejoined McKinsey's Chicago office. David and his wife now live in the Detroit area with their three kids where they enjoy travel and many activities including biking, golf, hockey, sailing, and skiing.

### Relevant Experience

Led 30+ transformations on operational excellence over the last 12 years. Examples include:

- **Led stand-up of a Small and Medium Sized business public-private-social sector partnership.** The effort rapidly responding to 20K+ SMBs in a major Master Service Agreement (MSA), building for them a one-stop shop – with digital, phone, and chat channels – for all of their small business needs (i.e., COVID relief, technical assistance, financial assistance).
- **Led multi-year operating model reinvention** and transformation at leading financial institution, with heavy emphasis on reskilling / upskilling next generation leaders.
- **Reinvented the purchase experience** at a leading mortgage originator and refinance institution.
- **Supported financial services integration and operating model transformation,** integrating two global firms and driving frontline adoption and scale of global standards, digital and analytics.

- **Led digital Operating Model transformation** for a leading Life Insurer, driving significant productivity savings in 4 years; and adoption and scale of digital assets.
- **Designed and implemented enterprise-wide agile at scale management system** at leading credit card institution; transforming cross-functional teams.
- **Led state-wide effort to examine future of work and skills amongst state employers**, partnering with public and private sector clients.
- Led pro-bono efforts within our Detroit community, including Detroit Group; and supporting connected critical Economic Development

## Education

Institution	Degree	Year
University of Michigan	BSE in Industrial Engineering	2008
University of Michigan	MSE in Industrial Engineering	2009
Kellogg School of Management (Northwestern University)	M.B.A.	2012



### 3.0 Example Cases and Work Product

We have compiled a set of relevant cases and work products summarized below that highlight our breadth and depth of expertise in rapidly standing up and leading challenging, complex efforts that require deep knowledge on operations and process optimization, a customer experience / design thinking lens, significant stakeholder coordination, and end-to-end project management.

We have chosen select examples from our work serving public sector agencies in NYC and NYS, as well as the extensive research and engagements done specifically within the domains of housing / homelessness. In addition to this, we have also served eight of the top 15 US states by population on broader public sector process optimization work, with three key examples from our broader footprint highlighted here.

Case	Subject Matter Relevance					Phase Coverage <sup>2</sup>		
	NYC	Public Sector	Housing / Human Services / Homelessness	Ops / Process Optimization	CX / Design Thinking	Current State Assessment	Prioritized Opportunities	Syndication & Communication
<b>NYC / NYS</b>								
3.1: Accelerating Nonprofit Contracting and Payment Processes with NYC Mayor's Office of Contract Services (MOCS)	✓	✓		✓	✓	✓	✓	✓
3.2: Improving Customer Experience and Outcomes of 911 Emergency Operations	✓	✓		✓	✓	✓	✓	✓
3.3: Designing a Housing Recovery Program in the Wake of Superstorm Sandy		✓	✓	✓	✓	✓	✓	✓
3.4: Supporting Core Pillars of Covid-19 Response Efforts in NYC	✓	✓		✓	✓	✓	✓	✓
3.5: Supporting the NYC 2022/2023 Mayoral Transition	✓	✓	✓			✓	✓	✓
<b>HOUSING / HOMELESSNESS</b>								
3.6: Revisioning How to Address Bay Area Homelessness (2023)		✓	✓	✓		✓	✓	
3.7: Addressing Bay Area Homelessness Using a Multi-Sector Approach with the Bay Area Council Economic Institute (2019)		✓	✓	✓		✓	✓	

<sup>2</sup> See Section 4.0 ("Proposed Project Plan") for details on proposed project breakdown into Phases. Phases align to Tasks 2-4 detailed in Section 1.0 ("Project Understanding and Approach") as follows:

- Current State Assessment (Phase 1) aligns to Task 2
- Prioritized Opportunities for Improvement (Phase 2) aligns to Task 3
- Syndication & Communications (Phase 3) aligns to Task 4

Case	Subject Matter Relevance					Phase Coverage <sup>2</sup>		
	NYC	Public Sector	Housing / Human Services / Homelessness	Ops / Process Optimization	CX / Design Thinking	Current State Assessment	Prioritized Opportunities	Syncination & Communication
3.8: Developing Turnaround Plan For a Top US City Public Housing Authority		✓	✓	✓		✓	✓	✓
3.9: Helping a State Housing Agency Respond To Potential Evictions During Covid-19		✓	✓	✓		✓	✓	✓
<b>PUBLIC SECTOR OPERATIONS / PROCESS OPTIMIZATION</b>								
3.10: Improving Claimant Experience Through Customer Experience Transformation in Maine		✓		✓	✓	✓	✓	✓
3.11: Designing New Mexico's Medicaid Agency of The Future		✓		✓	✓	✓	✓	✓
3.12: Transforming Unemployment Insurance Claimant Experience In US State		✓		✓	✓	✓	✓	✓
3.13: Redesigning US State's Unemployment Insurance Fraud Operations		✓		✓	✓	✓	✓	✓
<b>EXAMPLES FROM OUR MWBE PARTNERS</b>								
3.14: Conducting a 90-Day Review Process Of DHS and HRA Operations to Assess Agency Merger	✓	✓	✓	✓		✓	✓	✓
3.15: Implementing a Referral Process to Place Homeless Households into Tax Credit Apartments in NYC	✓	✓	✓	✓		✓	✓	✓
3.16: Supporting New Nonprofit in Effort to Improve the NYC Housing Voucher Process	✓	✓	✓	✓		✓	✓	✓
3.17: Accelerating the Delivery of Critical Housing and Human Services in the Wake of Hurricane Ian		✓	✓	✓		✓	✓	

### 3.1 Accelerating Nonprofit Contracting and Payment Processes With NYC Mayor's Office of Contract Services (MOCS)

<p><b>Relevance</b></p> <p>We helped NYC establish new processes to streamline and modernize procurement and contracting for nonprofit providers to reduce inefficiencies and delays and improve the nonprofit experience. We also helped identify new leadership and management practices to demonstrate a renewed commitment to timely nonprofit contracting and registration.</p> <p>Relevance includes detailed process mapping of a complex cross-agency process, use of the <i>Journey Pulse Survey</i> and interviews to develop a deep understanding of experience across stakeholder groups, gap and bottleneck analysis, and development of customer-centric optimization options that improved client experience, reduced redundancies, and increased efficiency.</p>
<p><b>Description</b></p> <p>Our team conducted the following key activities:</p> <ul style="list-style-type: none"> <li>• Led end-to-end project management including developing a project plan, distributing weekly status reports, and convening regular update meetings with the Working Team and cross-agency Steering Committee</li> <li>• Conducted current-state assessment on nonprofit procurement processes, including evaluating prioritized view of pain points, root causes, challenges, and enablers across procurement lifecycle for each nonprofit archetype</li> <li>• Conducted detailed data analyses, dozens of City employee interviews, detailed process mapping, focus groups and interviews with 50+ nonprofit leaders</li> <li>• Conducted a <i>Journey Pulse Survey</i> that included 1,500+ responses from nonprofit organizations to surface top pain points, opportunities for improvement</li> <li>• Developed options for specific improvements the nonprofit procurement process including developing future state processes and estimating potential resourcing implications from future process options and recommendations</li> <li>• Developed a set of 26 initiatives, outlining key milestones, stakeholders, and risks, a 12-month implementation roadmap, and a cross-agency governance and delivery assurance plan to support long-term impact</li> </ul>
<p><b>Impact of our work</b></p> <ul style="list-style-type: none"> <li>• Identified 26 initiatives with potential to:             <ul style="list-style-type: none"> <li>○ <b>Cut procurement timelines in half</b> for competitive contracts and discretionary awards</li> <li>○ Reduce retroactivity days for discretionary awards <b>from 380+ days to under 120 days</b>, and for the median competitive contract <b>from 82 days to 0</b></li> </ul> </li> <li>• One initiative, with the potential to reduce total competitive contract volume by ~33%, was implemented within weeks—even before the project was finished</li> <li>• Designed a “fast track” alternative process to streamline the majority of Discretionary contracts; this in the process of being implemented</li> </ul>

Work product examples

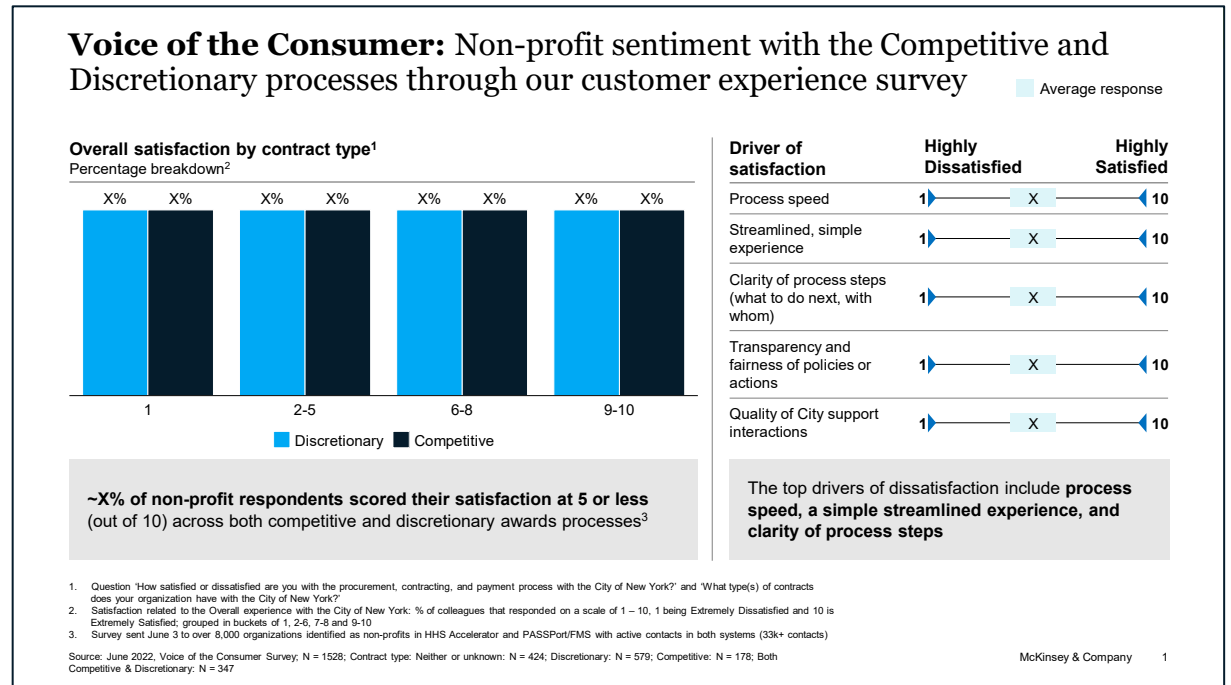


Exhibit 2: Utilizing customer experience surveys to better understand drivers of dissatisfaction.

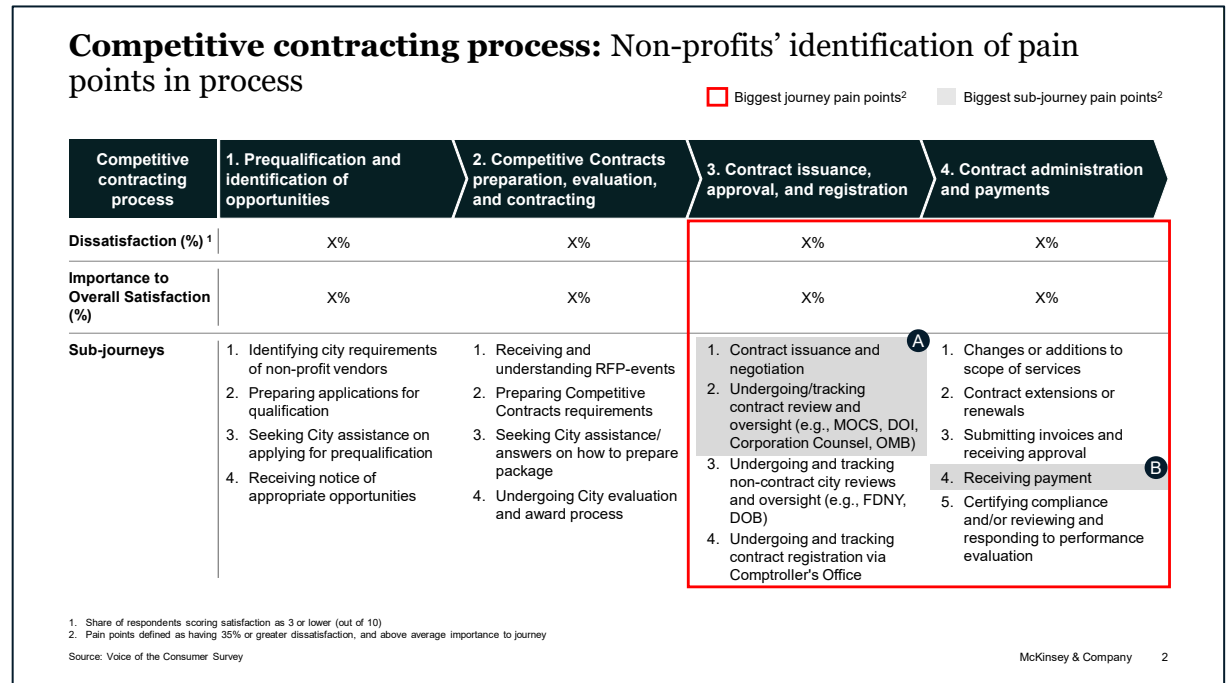





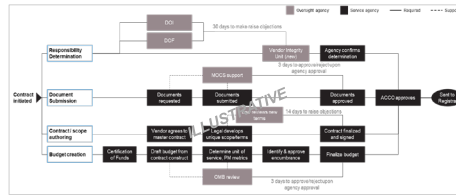
Exhibit 3: Customer journey mapping to identify pain points across stages.

## Streamline oversight: Reimagining what a simplified post-award process could look like

Informed by conversations with MOCS and Service Agency leaders

	 Consider removing	 Consider shifting	 Consider changing
<b>Example process streamlining opportunities</b>	<ul style="list-style-type: none"> <li>Public hearing (shift to public notice)</li> <li>DMO review (MOCS/ Agency duplication)</li> <li>All multi-level reviews (e.g. OMB Level 1 &amp; OMB Level 2 review)</li> </ul>	<ul style="list-style-type: none"> <li>MOCS &amp; OMB reviews happen fully in parallel with Agency review (or later via audit)</li> <li>Default to MOCS, OMB &amp; Law approval if not paused / rejected within given timeframe</li> </ul>	<ul style="list-style-type: none"> <li>New 'Vendor Integrity Unit' manages responsibility determinations, acts as clearinghouse for checkpoints and data related to vendor risk</li> <li>DOI and DOF work directly with Vendor Integrity Unit</li> <li>MOCS/OMB/Law offer additional support to Agencies lacking capacity</li> </ul>

### Illustrative post-award process



Source: Interviews with working team members and leaders from oversight and service Agencies

**Effective risk mitigation will be needed to support a simplified post-award process** (e.g., newly created 'Vendor Integrity Unit', performance management, or auditing)

McKinsey & Company 3

**Exhibit 4: Reimagined future state streamlined and simplified process. By contrast, the current-state process required multiple pages to map in its entirety.**

### 3.2 Improving Customer Experience and Outcomes of 911 Emergency Operations in NYC

<p><b>Relevance</b></p> <p>NYC engaged McKinsey to conduct a comprehensive operational review of its 911 system (10M+ calls annually). This required working across agencies (NYPD, FDNY, City Hall), as 911 is not overseen by one city entity, in a highly sensitive environment to ensure consistency of achieving near-perfect outcomes.</p> <p>For this effort, we ran an analytics diagnostic that identified breakpoints, conducted strategy and operations sessions across agencies, created a series of 25+ initiatives, launched implementation teams, stood up two governance bodies, and built central capabilities in the Mayor’s Office of Operations to replicate the analyses on an ongoing basis.</p> <p>Relevance to this specific RFP includes detailed operational review of the process of dialing 911 to arriving on-site, gap and bottleneck analysis, coordination across and incorporation of feedback from multiple client / stakeholder perspectives who oversee the system, and provision and implementation of recommendations that increased efficiency and reduced response times.</p>
<p><b>Description</b></p> <p>Our team supported NYC in the following:</p> <ul style="list-style-type: none"> <li>• Examined the 911 system end-to-end, from when the caller dials 911 to on-scene arrival</li> <li>• Used unsupervised and supervised analytics to understand the patterns in 911 call center all the way to the field -             <ul style="list-style-type: none"> <li>○ Time-series and geospatial modeling to establish challenges in the current operational model</li> <li>○ Predictive analytics for ‘long-tail’ events to understand operational drivers of major delays to Emergency Medical Services (EMS) arrival times</li> </ul> </li> <li>• Comprehensive call center and field diagnostics, which included extensive visits and side-by-side monitoring, and worked closely with 911 agencies to create buy-in / co-create initiatives</li> <li>• Built capability within Mayor’s Office of Data Analytics to run these analyses on ongoing basis and developed a series of cascading 911 dashboards that can be used all the way from the First Deputy Mayor to the operations within the agencies to monitor performance</li> </ul>
<p><b>Impact of our work</b></p> <p>NYC launched 25+ initiatives while team was the ground (e.g., created new staffing protocol, tapping into group of specialized hires, revisiting asset deployment model) that led to improvements across the system. Most notably, response times to critical emergencies decreased by ~10%, a significant achievement for a high-performing emergency operation. Example initiatives included:</p> <ul style="list-style-type: none"> <li>• <b>Process, tools &amp; systems</b> – Automated triage process, optimized scheduling, upgraded Computer-Aided Design (CAD) systems, optimized handovers</li> <li>• <b>Performance management</b> – Stood up operating committee to launch initiatives for ongoing continuous improvement, revamped real-time call monitoring, stood up cross-agency Quality Assurance (QA) team</li> <li>• <b>Mindsets &amp; behaviors</b> – Facilitated peer-to-peer coaching, huddles</li> <li>• <b>Skills</b> – Stood up in-house analytical capabilities to replicate descriptive and predictive 911 analyses on ongoing basis</li> </ul>

Work Product Examples

Insights informing potential initiatives to Relay volume and "under-assessment" in Relay

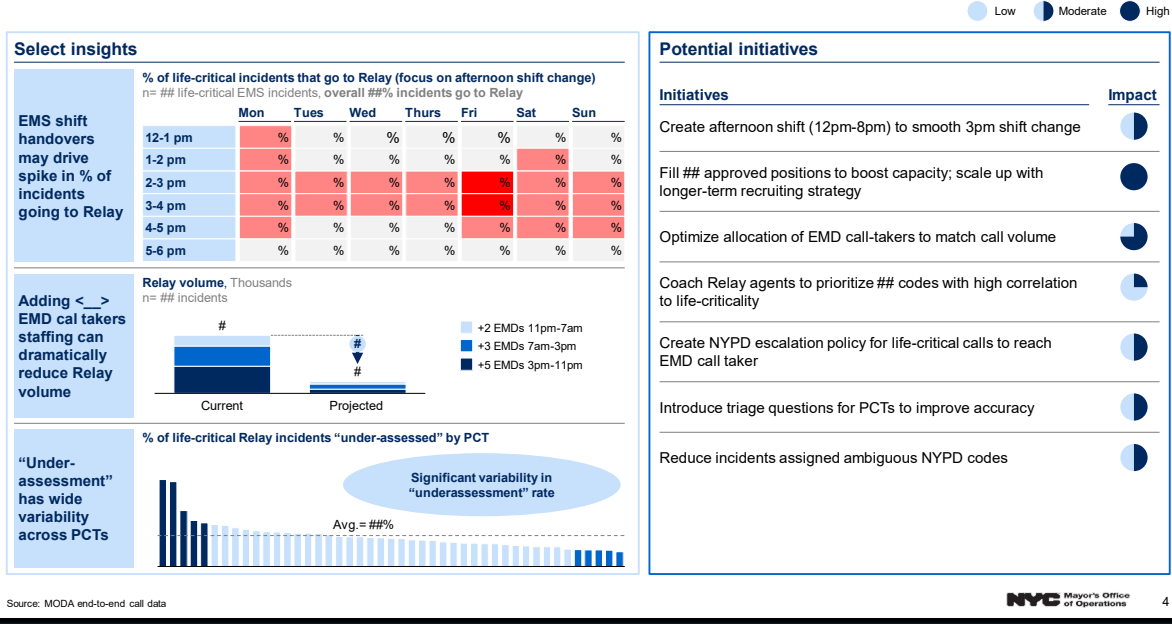


Exhibit 5: Example of key data-driven insights on process inefficiencies in different stages with potential initiatives mapped.

Ideas prioritized in top four sections

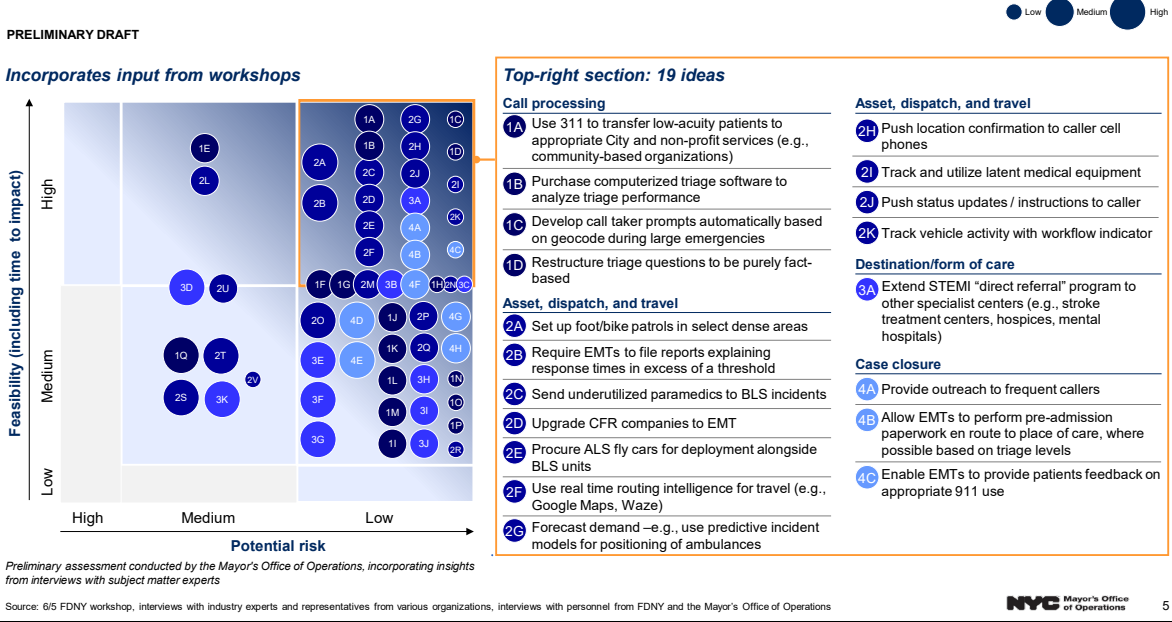


Exhibit 6: Prioritization approach for key recommendations across customer journey.

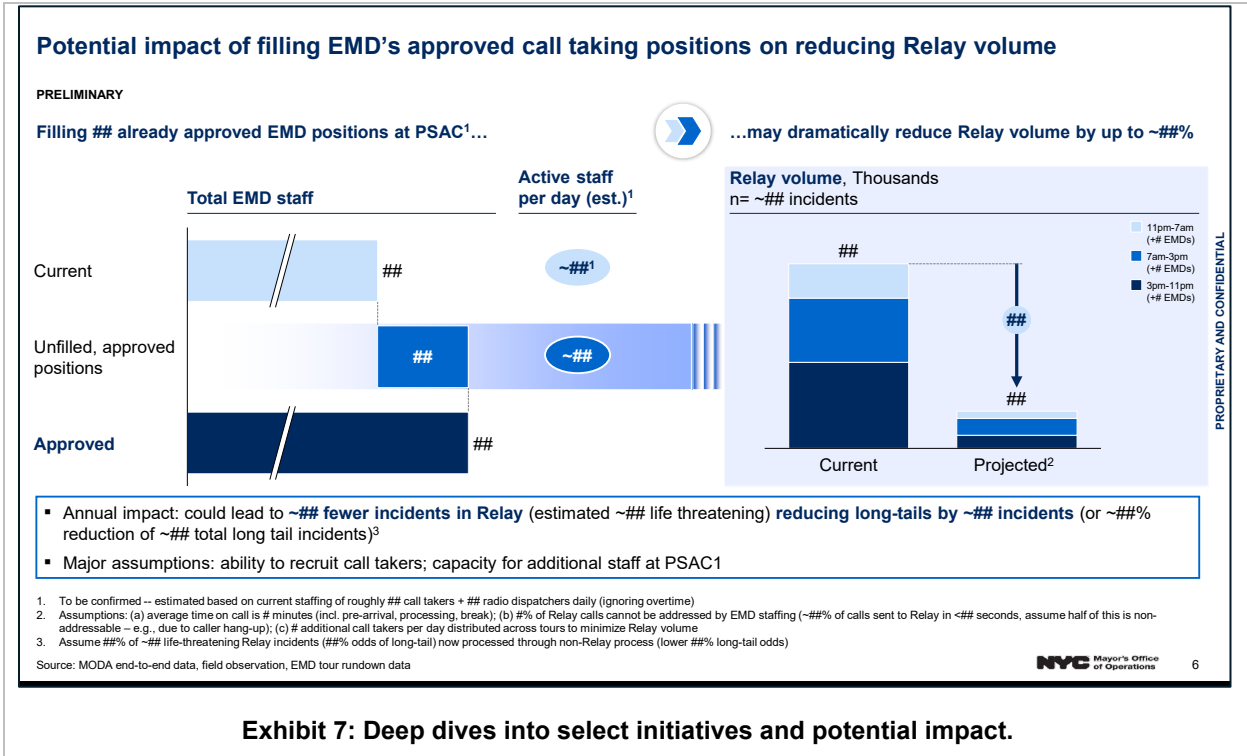


Exhibit 7: Deep dives into select initiatives and potential impact.



### 3.3 Designing a Housing Recovery Program in the Wake of Superstorm Sandy

Relevance
<p>In the wake of Superstorm Sandy's devastation in October 2012, McKinsey supported NYS in assessing and launching vast recovery programs across sectors (including housing, community development, and infrastructure), promoting government efficiency and operational excellence in recovery management, shepherding agencies through a period of financial stress, and assisting in responding to Federal mandates and regulatory changes. As part of this effort, we supported the design and implementation of the housing recovery program, which given the ~20,000 affected property owners in need of assistance, was the largest and most complex program of the State's overall recovery effort. The team developed optimized process maps across the entire program, enabling the State to identify cost and efficiency savings, as well as get aid out to homeowners faster. Relevance includes work at the intersection of housing and government, assessment of operational performance and identification of opportunities to drive efficiency, and overall project management. Though this effort related to sheltering people in a crisis not housing the homeless, the work demonstrates our ability to rapidly stand up a team and quickly streamline a complex process.</p>
Description
<p>As part of this effort, our team:</p> <ul style="list-style-type: none"> <li>• Advised the State on the use of strategic tools like process mapping to identify potential major future issues the State would face in the managing the recovery, working with the State to develop optimized process maps for the entire program. For each process step across the two major components of the housing program process – case management and construction management – the team identified estimated “throughput” time (i.e., time it would take for one applicant to pass through each step of the process), clear process step owners, and appropriate “service level” targets (i.e., goals for timelines, error rate and fraud minimization, overall customer satisfaction).</li> <li>• Developed specific, clear, and concise options for the State on aid management processes including involved parties, estimated throughput times for each process stage of the program, and outputs at each stage.</li> <li>• Conducted detailed analytics on applicants and policy decisions to deliver a framework for decision-making around staff allocation (e.g., case workers, home inspectors, call center workers), identification of internal and external risks, and program demand management; this included:             <ul style="list-style-type: none"> <li>○ Detailed analytics and data from rental applicant and pre-registrant data and precedent disaster programs for rental coverage</li> <li>○ Detailed data on options for three open Single-Family Homeowner policy decisions: DOB escrow requirements, elevation coverage, and reimbursement coverage</li> <li>○ Fact base about case manager and construction capacity constraints for Single-Family Homeowner</li> </ul> </li> <li>• Supported the delivery of the housing and small business recovery programs by first running pilots (i.e., including defining organizational roles and responsibilities, gathering data on performance against implementation goals, identifying policies that hindered process performance, identifying performance gaps and significant bottlenecks, etc.)</li> <li>• Assisted in the rollout of the Housing and Small Business Recovery programs. This included setting up the management systems critical to support continuous improvement. These systems included an internal data analytics capability to monitor performance across processes to ensure a continued focus on achieving results and developing a definition and a target for each operational metric.</li> <li>• Supported implementation of strategies and change management initiatives to ensure sustainability by employing coaching, mentoring, and training approaches in the call center. These initiatives included using tailored agent inbound and outbound call scripts, strategic email, and incentives to accelerate pace of cash distributions, ensure appropriate documentation was</li> </ul>

collected, and redirect channels through which participants interacted with the program. The team counseled and coached senior leaders daily.

#### Impact of our work

**Strategic impact:** Deployment of more aid faster to homeowners than any prior federally funded disaster recovery effort, with \$1B+ in aid distributed to more than 11,000 homeowners.

**Operational impact:** Enabled NYS to use federal taxpayer dollars cost effectively by identifying 30% in delivery cost savings and using highly flexible process design. The program accepted applications from affected homeowners 6 months beyond the application deadlines of NJ and NYC. The New York Times (NYT) praised the flexibility of the process, noting that by “avoid[ing] a rigidly sequential system,” it was able to significantly outpace peer jurisdictions in its housing recovery (NYT, Sep 5, 2014).

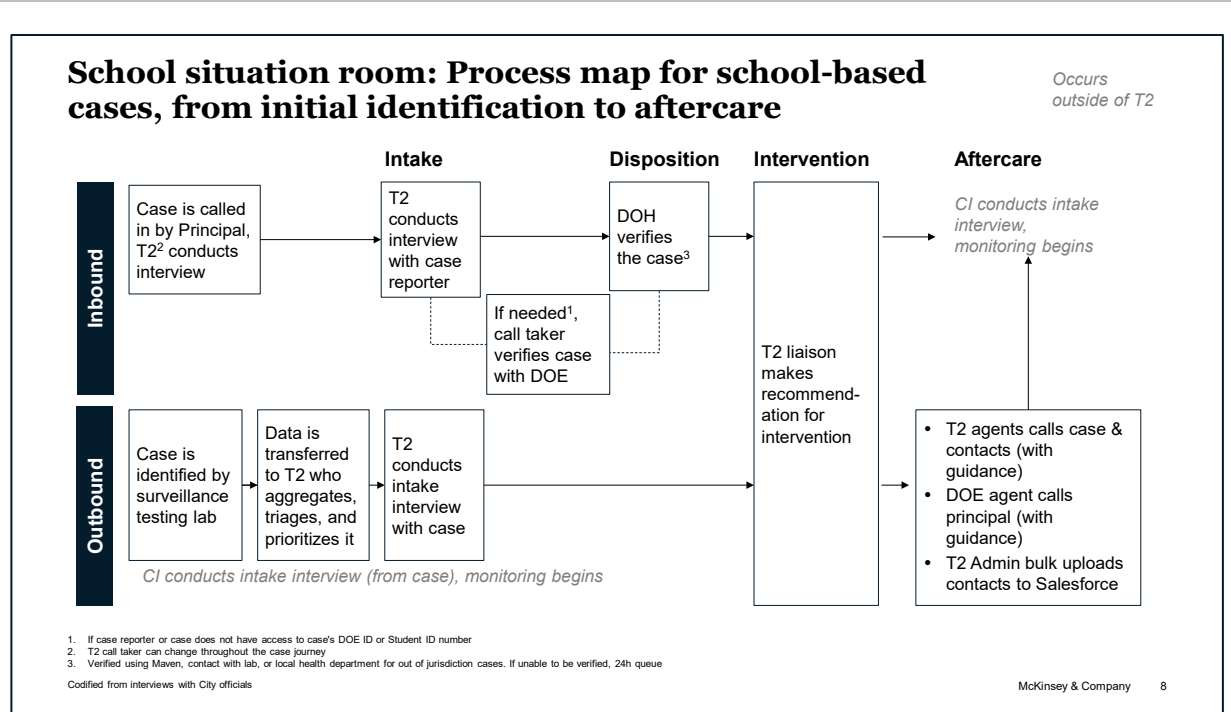
**Organizational impact:** Stood up the housing recovery organization, including creating staffing models, coaching, and building capability. One client noted, “You all should be incredibly proud of the program you nurtured from its infancy and the [client] team you lobbied for and have truly inspired. I personally feel inspired by the work you have done and will strive every day to be worthy of the programs you launched and supported so passionately.” (Email, Apr 10, 2014).

**Customer service impact:** More aid (~\$1B) was deployed faster to homeowners than any prior federally funded disaster recovery effort, enabling homeowners to rebuild faster.

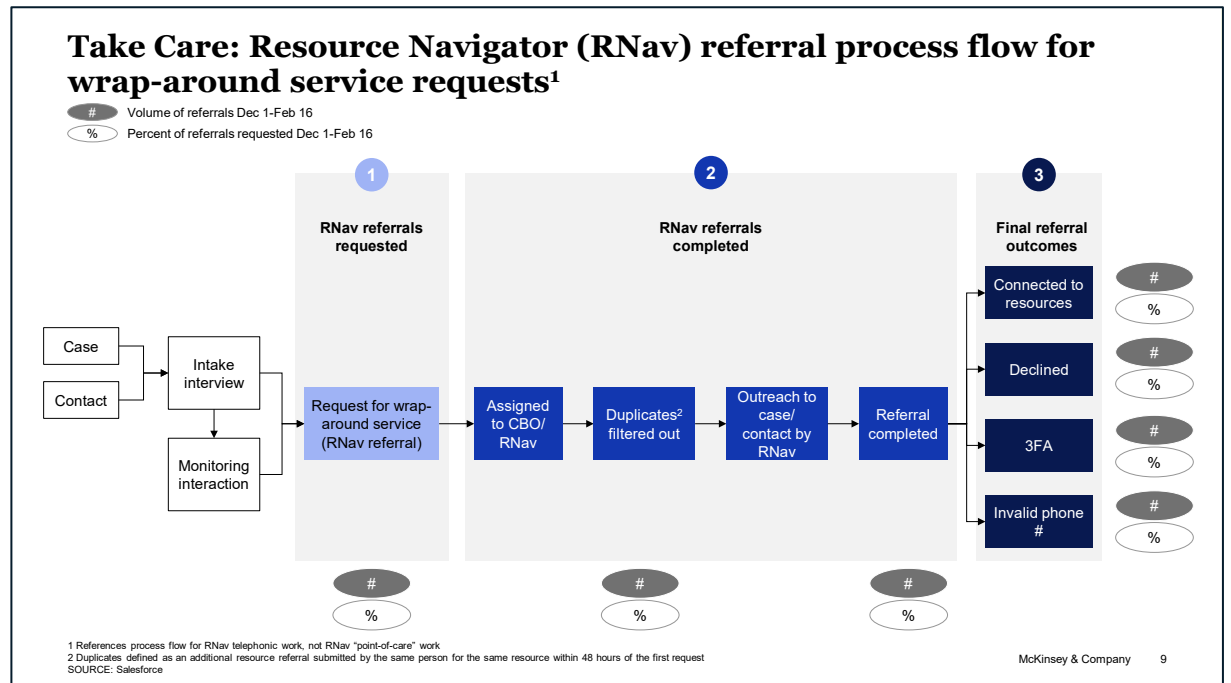
### 3.4 Supporting Core Pillars of Covid-19 Response Efforts in NYC

Relevance
<p>The City sought support in standing up its COVID-19 test-and-trace response; in collaboration with other City Agencies and a third-party provider, we supported the City in setting up contact tracing, a command situation room for school reopening, and vaccine deployment. Relevance includes detailed reviews of operational processes, coordination across and incorporation of feedback from multiple client / stakeholder perspectives, development of detailed recommendations on needed changes (e.g., in resource allocation).</p>
Description
<p><b>For contact tracing</b>, our team:</p> <ul style="list-style-type: none"> <li>• Provided overall program management on behalf of the City, including stakeholder coordination, leadership support, and strategic analyses</li> <li>• Conducted detailing mapping of call center processes (e.g., queuing process, investigation, and wraparound services processes), working with the City to refine processes where necessary (e.g., troubleshooting how cases were moved from each step of the queuing process, identifying how cases are passed between groups, how information is stored and aggregated)</li> <li>• Mapped customer journey experience from resident perspective (i.e., mapped case intake process and timelines for residents going through test-and-trace process)</li> <li>• Supported the City in standing up multiple thousand-person operations of call center, including hiring, onboarding, within 2 weeks</li> <li>• Developed data-backed insights for the proactive identification of emerging hotspots and informed re-allocation decisions (e.g., Testing, Take Care)</li> <li>• Supported City's "Take Care" pillar, which ultimately provided &gt;350k people with access to critical resources (e.g., food and groceries, hotel and housing support, COVID-19 test kits), including developing tracking metrics including resource utilization and population uptake and troubleshooting reporting and queuing process (to refer cases from general queue to Take Care support)</li> <li>• Identified opportunities for process improvement by tracking process bottlenecks (e.g., duplicate entries) and piloting innovations across Resource Navigators, who provided wraparound services for thousands New Yorkers</li> <li>• Conducted operational stress testing based on different scenarios to identify trigger and breakpoints for key processes and capacity; as part of this, identified opportunities for greater productivity and efficiency (especially at high case volumes during peak periods or given holiday staffing schedules)</li> <li>• Supported 5+ different City teams to build capabilities in, e.g., resource navigation, community engagement, with cross-jurisdiction &amp; global public health sessions</li> </ul> <p><b>For DOE school situation room</b>, our team:</p> <ul style="list-style-type: none"> <li>• Supported H+H's role in the City DOE's Situation Room, which was established to monitor and manage the H+H and NYC DOE COVID-19 testing program</li> <li>• Supported the City in data process flow mapping, dashboard development and visualization, system requirements based on business needs and internal/external reporting requirements</li> <li>• Supported cross-agency stakeholders, in codifying, identifying areas of improvement, and strengthening operational protocol</li> </ul> <p><b>For vaccine deployment</b>, our team:</p> <ul style="list-style-type: none"> <li>• Developed and provided regular reporting to inform VCC and H+H's situational awareness along key dimensions of the vaccine rollout (e.g., dose allocation, dose administration, in aggregate, by site, for certain demographics)</li> <li>• Analyzed vaccine uptake by certain population demographics to help inform the City's communication strategy (e.g., multi-lingual awareness efforts)</li> </ul>





**Exhibit 9: Initial process map developed for school-based cases, used to identify data flows and steps requiring test-and-trace (T2) stakeholder interventions needed.**



**Exhibit 10: Process flow for Resource Navigator wraparound services ("Take Care" pillar).**

### 3.5 Supporting the NYC 2022/2023 Mayoral Transition

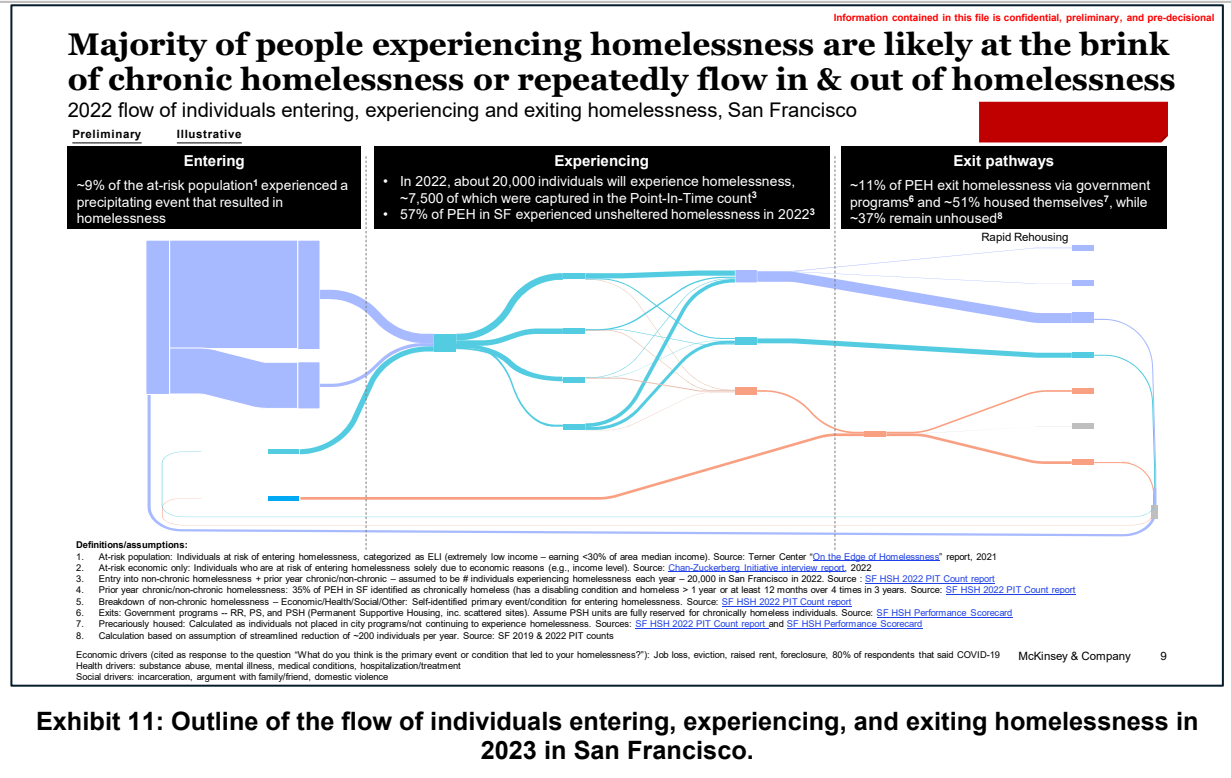
<b>Relevance</b>
<p>McKinsey supported the City’s 2022/2023 Mayoral administration in creating a transition report for its Human Services committee, which outlined the committee’s vision, mission, and strategic priorities for Human Services and their associated initiatives and implementation plans. Relevance includes the topic of housing, interviews of and incorporation of feedback from ~40 stakeholder committee members, synthesis of estimated timeframes, and development of communications plans across strategic priorities.</p>
<b>Description</b>
<p><b>For the Housing committee:</b></p> <ul style="list-style-type: none"> <li>• Detailed case for change, evidence base, equity measures, and key performance indicators for potential initiatives across topics including public housing, homelessness, housing preservation, eviction prevention, and wealth building</li> <li>• Moderated workshops and working sessions with ~20 committee members focused on organization of housing entities and initiatives to further equity in City’s housing efforts</li> <li>• Supported Housing committee staff and leadership in articulating plans and key dependencies across other transition priorities</li> <li>• Articulated potential implication of economic development initiatives on housing, opportunities for potential state or federal collaboration on housing, and potential options for improving collaboration between housing and human service agencies</li> </ul> <p><b>For the Human Services committee:</b></p> <ul style="list-style-type: none"> <li>• Supported Human Services committee convened by the incoming Mayoral administration to create a transition report that: <ul style="list-style-type: none"> <li>○ Defined the committee’s overarching vision and mission for Human Services in NYC</li> <li>○ Provided an overview of existing programs that committee was proposing changes by agency</li> <li>○ Identified the top issues facing city residents according to the committee (e.g., homelessness/housing, access to benefits, children in shelters)</li> <li>○ Defined the committee’s strategic priorities on Human Services</li> <li>○ Codified the key risks, deadlines associated with each of the key initiatives</li> <li>○ Detailed committee’s key initiatives, the case for change, action plans for immediate and long term, and Key Performance Indicators (KPIs) to be tracked</li> </ul> </li> <li>• Held workshops with ~40 committee members to collect perspectives from members, other stakeholders, and support members in defining their key challenges and proposed plans</li> <li>• Syndicated strategic plans across transition committees where there were identified interdependencies in their plans, collecting feedback and holding working sessions to address gaps</li> </ul>
<b>Impact of our work</b>
<ul style="list-style-type: none"> <li>• Facilitated working sessions and committee meetings surfaced key governance questions for housing portfolio and the importance of integration between housing and homeless services agendas, which translated into tighter integration and shared responsibility in administration’s blueprint</li> <li>• Strategic priorities defined by the committee included focusing on improving access to shelters, bringing the city to communities, improving outcomes for residents; also included childcare as cross-cutting priority</li> <li>• Stakeholder alignment and support provided across 3 key priorities to focus on for 100 days</li> </ul>

### 3.6 Revisioning How to Address Bay Area Homelessness (2023)

<b>Relevance</b>
<p>McKinsey conducted research on the current state of homelessness in the Bay Area and potential opportunities to address the crisis based on publicly available data and expert interviews as part of an ongoing pro-bono initiative on the topic. The research aims to recognize the distinct problems faced by those who are unstably housed and consider bold approaches to re-envision the homeless services response ecosystem around people, not siloed individual programs.</p> <p>Relevance includes conducting interviews with stakeholders working to address homelessness across sectors, analyzing process flow for individuals experiencing homelessness, identifying opportunities to reduce the number of individuals across this flow, and recommendations to improve service experiences.</p>
<b>Description</b>
<p>Our team:</p> <ul style="list-style-type: none"><li>• Analyzed the current state of homelessness in the Bay Area and root historical causes of the challenge</li><li>• Mapped the end-to-end process flow of individuals entering, experiencing, and exiting homelessness in San Francisco in 2022</li><li>• Identified opportunities to better support at-risk households, non-chronic, and chronic experiences across this process; prepared options and implications of each</li><li>• Developed preliminary insights on potential interventions to address Bay Area homelessness</li><li>• Analyzed funding sources and allocation of resources across the flow of individuals entering, experiencing, and exiting homelessness</li></ul>
<b>Impact of our work</b>
<p>The forthcoming research identifies potential opportunity areas to bend the curve homelessness across three focus areas:</p> <p><b>At-risk:</b> Those that are current housed but at-risk of homelessness would benefit most from preventative measures—keeping them sustainably housed is required for addressing the problem long-term. Programs that increase the affordable housing stock, enhance income and economic mobility, and strengthen approaches to keeping people housed (e.g., emergency rental assistance, tenant support services, and tenant right-to-counsel) could impact the growth trajectory of the demand side of the homelessness equation.</p> <p><b>Non-chronic:</b> For those experiencing non-chronic homelessness, improving the efficiency and coordination of existing resources and support mechanisms can accelerate exits from the homelessness cycle. This may involve prioritizing interventions with demonstrated program effectiveness relative to other solutions (e.g., interim supportive housing is 10-times more effective than street outreach in transitioning individuals to permanent housing<sup>1</sup>). Likewise, improving case management, coordination, interoperability, and information-sharing between organizations and agencies would reduce fragmentation in the response system, resulting in faster outcomes for families in need while saving and redirecting inefficient resources.</p> <p><b>Chronic:</b> well as the financial cost is often borne by the public health system and may be addressed holistically as a public health challenge with funding coordinated at a state or regional level. This may involve intensive interventions like long-term residential recovery programs<sup>2</sup>, integrated care campuses<sup>3</sup> and permanent supportive housing that reach the chronically homeless population, transition them into housing, and address their holistic needs.</p> <p><sup>1</sup> <i>How Interim and Permanent Housing Can Work Together to End Homelessness</i>, <a href="#">All Home</a>, May 2022</p>

- <sup>2</sup> Examples of long-term residential recovery programs include:
1. St Anthony’s [Father Alfred’s Center \(FAC\)](#) – a year-long addiction recovery program that provides access to counseling and spiritual services, individual therapy, evidence-based group counseling, peer counseling, technology access, primary medical treatment, job training, psychiatric care, case management services and medically-assisted treatment. FAC guests are also paired up with ‘companions’ who will provide non-clinical and long-term recovery support over a 3+ year period.
  2. The [Fort Lyon Recovery Program](#) in Colorado – a 2-year non-clinical, peer-based, recovery-oriented transitional housing program that provides housing, basic needs, and services such as individualized recovery program, case management and peer specialists, integrated primary and behavioral healthcare, pre-employment modules, DUI education and therapy classes, assistance with benefits, and recovery resources.
- <sup>3</sup> For example, [Haven for Hope](#) in San Antonio, Texas is a 22-acre “one-stop” campus that provides shelter while clients work to address the issues that have led to their homelessness. Approximately 180 partner organizations collaborate to provide wide-ranging comprehensive services, from obtaining identification, to substance abuse and men to securing permanent housing

Work product examples





### 3.7 Addressing Bay Area Homelessness Using a Multi-sector Approach With the Bay Area Council Economic Institute (2019)

<p><b>Relevance</b></p> <p>McKinsey partnered with the Bay Area Council Economic Institute in a pro-bono capacity to conduct a report on the current state of regional homelessness, aiming to provide civic leaders data and perspectives to inform their ongoing approaches to address homelessness, with a focus on regional solutions. Relevance includes working with stakeholders working to address homelessness, conducting interviews to gather perspectives and insights, and developing overall synthesis to create a final published report.</p>
<p><b>Description</b></p> <p>Our team:</p> <ul style="list-style-type: none"> <li>• Gathered perspectives from those who work daily to address homelessness by interviewing 35 experts and practitioners, including county and city officials, nonprofit providers, philanthropic leaders, healthcare professionals, advocates, and homeless individuals themselves</li> <li>• Aggregated and analyzed regional homeless data using Point-in-Time (PIT) counts conducted by volunteers and public employees within individual counties; HUD PIT and Housing Inventory Counts were the primary quantitative sources for the study</li> <li>• Synthesized quantitative and qualitative sources of insight to develop a current-state assessment (e.g., homelessness in the Bay Area by the numbers, mapping the homelessness crisis response system to identify gaps, and estimating potential cost to end homelessness), as well as root causes (e.g., housing supply and affordability, inventory of shelters, permanent supportive housing, and rapid rehousing)</li> <li>• Developed ten opportunity areas with potential interventions to accelerate ongoing efforts to address Bay Area homelessness</li> </ul>
<p><b>Impact of our work</b></p> <p>The report used regional data to recommend potential opportunity areas spanning three categories:</p> <ol style="list-style-type: none"> <li>1. <b>Stem new inflows into homelessness and increase exits.</b> Addressing homelessness at its earliest stages requires more effective diversion and prevention programs to keep individuals and families in their homes. Considering opportunities to expand housing available to extremely low-income households making 0 and 30% of area median income.</li> <li>2. <b>Drive greater state and regional collaboration.</b> Identify opportunities for the state to play a more active role in supporting local communities to meeting objectives and ensure accountability.</li> <li>3. <b>Simplify and improve homeless services.</b> Private and philanthropic capital can be deployed in innovative ways, from testing the effectiveness of interventions with Pay for Success programs to using technology to improve service delivery.</li> </ol> <p>The Bay Area Council Economic Institute's full report can be found here: <a href="#">"Bay Area Homelessness: A regional view of a regional crisis."</a></p>

Work Product Examples

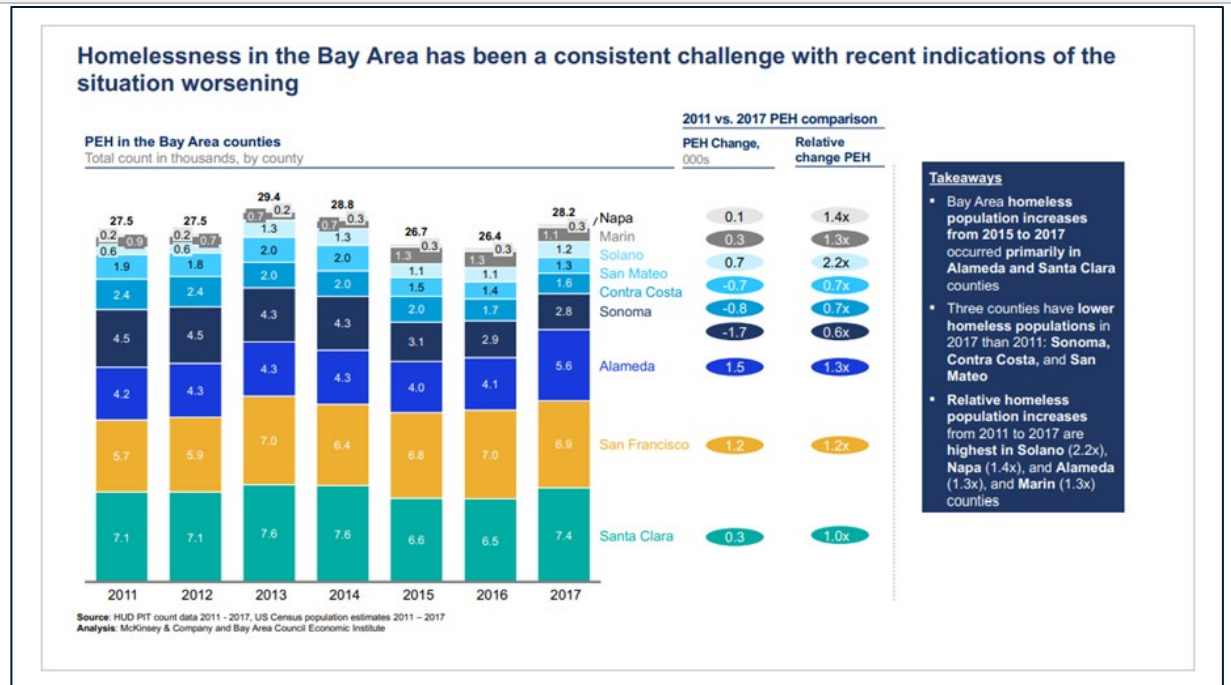


Exhibit 12: Current state analysis of overall Bay Area homeless population increase

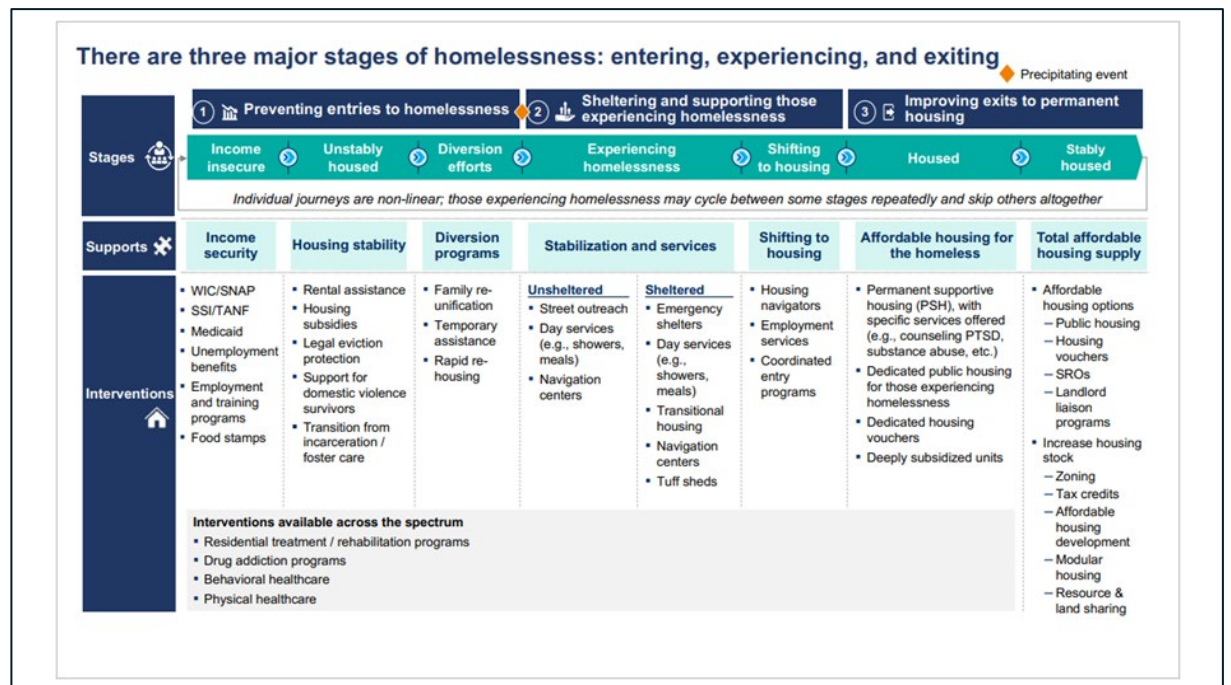


Exhibit 13: Description of potential interventions across different stages of homelessness.



Exhibit 14: Example of breadth of stakeholder and expert interviews to inform research.

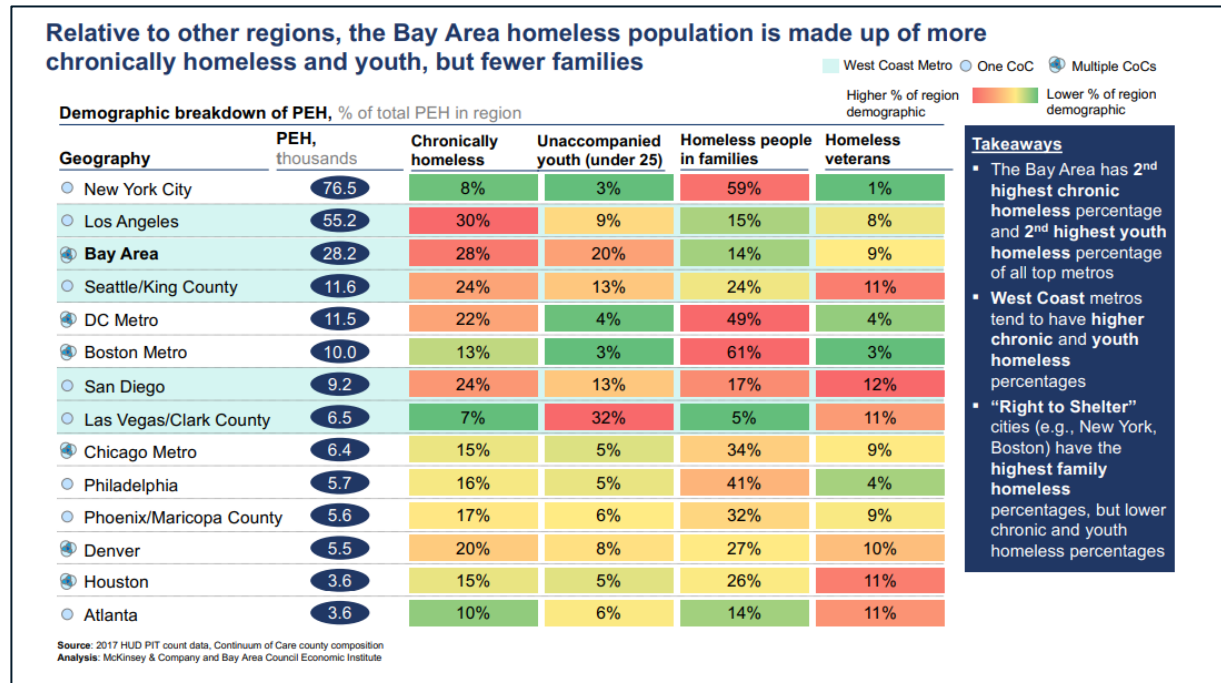


Exhibit 15: Analysis showing benchmarking of homelessness populations across geographies.

### 3.8 Developing Turnaround Plan for a Top US City Public Housing Authority

Relevance
<p>One of the ten largest public housing authorities (PHA) asked McKinsey for support to build and begin to execute a turnaround plan given multiple crises – e.g., large numbers of children living in units with lead, widespread mold and pests, capital needs 50 times greater than annual capital funding, and urgent external deadlines to take advantage of new HUD program flexibility. The organization and operating model had largely stayed the same for many years, and the organization had not updated its strategic plans, despite the emerging crises.</p> <p>Our team helped agency leadership to define a strategic vision for the core mission of the agency, define specific goals (to meet externally mandated deadlines and broader operational improvements), prioritize initiatives to delivery against those goals, and implement performance management approaches to track progress. We analyzed operational processes across all major departments (e.g., property management, capital programs), mapped functions, and identified major gaps. We benchmarked operating costs, staffing, and outcomes against peer PHAs and private sector providers to identify areas for additional operating improvements and organizational redesign. We then did a deep dive into portfolio planning in order to build a plan for how to address all capital needs in less than 20 years and to address the most urgent issues in less than two years. Additional work included stakeholder analysis, given the complex decision-making environment, and development of plans for resident engagement. Relevance includes stakeholder analysis, operational process maturity assessment, and process/functional mapping.</p>
Description
<p><b>Step 1: Project Management and Mobilization</b></p> <ul style="list-style-type: none"> <li>• Identified key stakeholders to discuss project plan, roles, responsibilities</li> <li>• Established a working model (e.g., executive sponsor, team, and daily lead(s)) and engagement governance structure</li> <li>• Launched and collected data request and review all existing strategies and goals; reviewed all prior efforts including other consulting outputs</li> <li>• Scoped project plan including timeline for deliverables and key areas of analysis on core business processes</li> <li>• Launched Mobilization, Stakeholder Engagement to win back trust of residents and employees</li> </ul> <p><b>Step 2: Captured the as-is Operational and Organizational Structure</b></p> <ul style="list-style-type: none"> <li>• Reviewed existing data, including resident and advocate feedback data, analyzing to identify recurring themes and challenges that need to be addressed</li> <li>• Reviewed strategic plans, external analyses, and current organizational priorities to baseline current state</li> <li>• Mapped governance process of key decisions, including role of PHA board, city housing community and city stakeholders</li> <li>• Established fact base to enable PHA to understand factors that affect performance</li> <li>• Reviewed strategies of peer housing authorities and other similar organizations to identify innovative approaches</li> <li>• Identified gaps in current performance and capabilities and areas of misalignment; identified methods to fill gaps to move forward with organizational analysis</li> <li>• Conducted targeted interviews with senior team, employees, PHA board, housing advocates, City representatives and residents to seek relevant stakeholders’ ideas on what improvements they would find most impactful</li> </ul> <p><b>Step 3: Defined strategic, organizational, and operational aspirations and communications plan</b></p> <ul style="list-style-type: none"> <li>• Conducted a rapid analysis of expected impact on finances, operations, residents</li> <li>• Set the aspiration with PHA leadership given current state of organizational maturity and value proposition within the city’s affordable housing delivery strategy</li> </ul>

- Developed a change narrative and communications plan

**Step 4: Identified Recommendations Based on Prioritized Assessment Areas**

- Conducted targeted analyses that could address capital portfolio, organization, operations, resident needs, opportunities for new funding.
- Conducted extensive examination of portfolio planning, to build a plan for how to address all capital needs in <20 years, and to address the most urgent issues in <2 years. We built a portfolio optimization tool that allows senior leaders to define different parameters, input real costs and financing options per property, and adjust numerous other toggles (e.g., development approach, property mgmt. type, zoning, relocation approach, willingness to sell or lease unoccupied parcels of land) to run more than 100M calculations and produce an optimized portfolio and redevelopment schedule given those constraints.
- Explored feasibility and estimated impact of additional sources of funding.
- Developed long list of potential initiatives.

**Step 5: Developed Roadmap, Communications and Stakeholder Engagement plan**

- Developed an implementation roadmap that incorporates the portfolio of initiatives and corresponding steps to deliver initiatives, pending approval of strategic initiatives
- Stood up implementation teams deploying our Influence Model, people-centered approach to achieve sustained change
- Defined the change management plan including identification of key stakeholders, key messages, communication methods

**Impact of our work**

- Sample initiatives identified up to 70% reduction in upfront redevelopment and rehabilitation costs to bring the full portfolio to 20-year viability
- Organization now benefits from ability to size the cost of different options put forward by stakeholders in real-time to enhance decision-making

### 3.9 Helping a State Housing Agency Respond to Potential Evictions During Covid-19

<b>Relevance</b>
<p>A State Housing Agency was preparing for the lifting of a moratorium on evictions during COVID-19. The State needed to understand the potential volume of citizens who would need support (e.g., rental assistance, community mediation) and how best to inject support (e.g., expanded capacity, assistance through funding). Also, the State had an urgent need to stand up a suite of programs to help renters—including legal aid and homelessness diversion—and to create transparency for decision-makers on the government’s response. Relevance includes working with public sector housing authorities and subject matter expertise in housing-related governance, processes, and systems.</p>
<b>Description</b>
<ul style="list-style-type: none"> <li>• Created a “fact pack” on current state of housing, rental prices, court cases, national eviction data, critical timelines of federal and state benefits, and data/best practices from other jurisdictions</li> <li>• Modeled scenarios of potential eviction volumes to help the State prepare a response</li> <li>• Supported overall program management across stakeholders, including the Governor’s office, local community partners and Non-Governmental Organizations (NGOs), multiple state agencies, and the court system</li> <li>• Worked with the agency to design and create dashboards on critical indicators (e.g., calls on housing-related issues, rental assistance payments, shelter admissions)</li> </ul>
<b>Impact of our work</b>
<ul style="list-style-type: none"> <li>• Produced scenarios of potential eviction filings by month for after the moratorium lifted to help the state direct its programmatic response</li> <li>• Supported the design of interventions across seven stages of the eviction process to support tenants, including legal aid, community mediation, and homelessness prevention</li> <li>• Helped launch and stand up dashboards to track progress on ~\$100m of citizen support programs, a &gt;250% increase in the state’s typical spend</li> </ul>

Work product examples

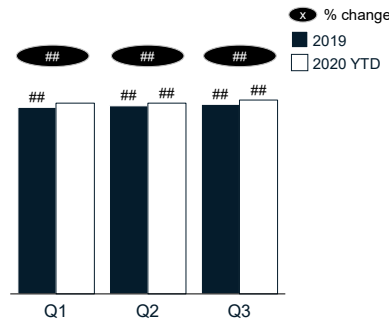
### Establishing a “fact pack” on the current state of housing

Using data on rents to understand potential landlord behavior

While the pace of growth has slowed, average rents across major counties<sup>1</sup> have still risen slightly year over year

Average rent comparison by quarter, 2019-2020

Dollars and % change since previous year



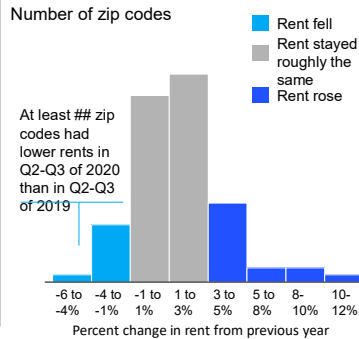
1. Counties included in analysis: [sanitized]  
2. Only includes July and August market rate rents

Source: Zillow Observed Rent Index – January 2019 to August 2020; A smoothed measure of the typical observed market rate rent across a given region. ZORI is a repeat-rent index that is weighted to the rental housing stock to ensure representativeness across the entire market, not just those homes currently listed for-rent. The index is dollar-denominated by computing the mean of listed rents that fall into the 40th to 60th percentile range for all homes and apartments in a given region, which is once again weighted to reflect the rental housing stock. The data is seasonally adjusted.

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While most rents have not changed much, some rents did fall in Q2 and Q3 of 2020 compared to the previous year<sup>1</sup>

Zip codes where rent was lower, the same, or higher during COVID than it was at the same time the previous year



At least ## zip codes had lower rents in Q2-Q3 of 2020 than in Q2-Q3 of 2019

Rent has risen in some communities...

Zip	% change	Area
Zipcode	10%	[sanitized]
Zipcode	10%	[sanitized]
Zipcode	10%	[sanitized]
Zipcode	7%	[sanitized]
Zipcode	6%	[sanitized]

And fallen in others...

Zip	% change	Area
Zipcode	-6%	[sanitized]
Zipcode	-4%	[sanitized]
Zipcode	-2%	[sanitized]
Zipcode	-2%	[sanitized]
Zipcode	-2%	[sanitized]
Zipcode	-2%	[sanitized]

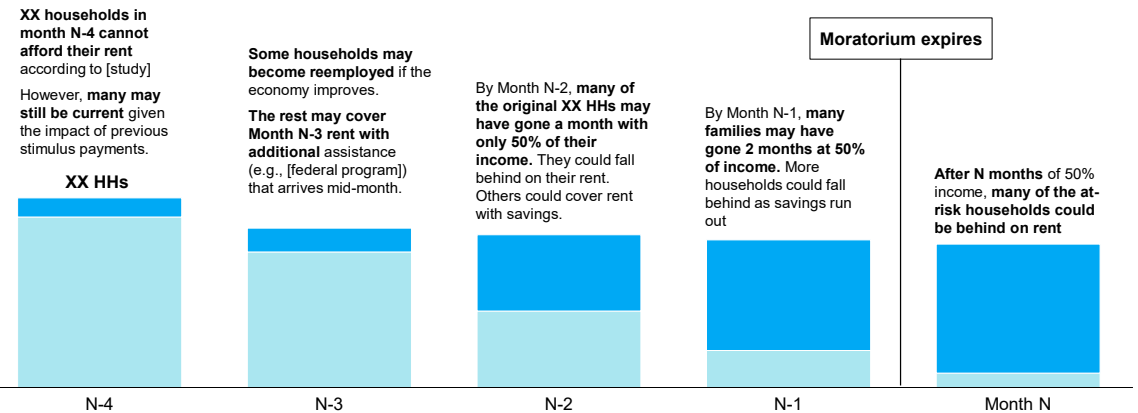
Exhibit 16: Example component of “fact pack” to understand current state of housing to inform potential landlord behavior.

### Understanding eviction timing through modeling scenarios

Understanding how timing of federal stimulus and unemployment may contribute to filings (key model input)

Given the timing of benefits expiring, households at risk in Month N-4 could be several months behind on rent by Month N

ILLUSTRATIVE



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Exhibit 17: Example output of modeled scenarios illustrating eviction timing to help the State understand the potential volume of households who may need support.

### 3.10 Improving Claimant Experience Through Customer Experience (CX) Transformation in Maine

<p><b>Relevance</b></p>
<p>Maine’s DOL witnessed an unprecedented spike in unemployment claims due to the COVID-19 pandemic, leading to a dramatic increase in the claims backlog and long delays in outgoing benefits payments. Once initial backlog triage was complete, we supported Maine’s DOL with a broader customer experience transformation to improve the claimant experience using customer journey mapping and claimant surveys to identify and resolve customer pain points through experience redesign.</p> <p>Relevance includes detailed process mapping and customer experience assessment, informed by numerous interviews and surveys of Unemployment Insurance (UI) applicants, as well as development of process optimization initiatives to yield improved operational efficiency.</p>
<p><b>Description</b></p>
<p>Specifically, we:</p> <ul style="list-style-type: none"> <li>• Conducted interviews with 25+ staff and launched an extensive survey of UI applicants to understand UI customer needs, experiences, mindsets, and behaviors while interacting with the department</li> <li>• Developed a set of eight customer journeys for claimants, job seekers, and employers based on user personas stratified by education level, demographics, and employment type to understand potential impact of long-term levers for improvement</li> <li>• Assessed tradeoffs, required actions, timelines, and the impact of anticipated improvements</li> <li>• Implemented short- and long-term operational process improvement initiatives to reduce claims backlog and improve claims processing throughput to manage incoming claims in a sustainable way; this included 12 “quick-win” solutions to implement within 4 months plus an integrated roadmap of ten prioritized long-term improvements</li> <li>• Redesigned weekly claim submission screen design, language, and system flow to guide users through the process, increase completion of correct claims, and decrease preventable backlog</li> <li>• Improved web interfaces for confirmation emails, weekly claim submission, and work-search certification</li> <li>• Developed claims status check screens to provide intuitive and plain-language information</li> </ul>
<p><b>Impact of our work</b></p>
<p>50+ pain points across the unemployment and re-employment journeys were identified and eight user journeys were mapped for claimants, job seekers, and employers. The implementation of 12 “quick-win” solutions within four months significantly improved CX and increased agency efficiency, leading to 10X claim adjudication throughput, 5X increase in weekly certification processing, 25% reduction in call center volume, and 58% increase in detection of fraud.</p>



Work Product Examples

### Automation of critical manual tasks allow sustainable transition to the next normal

Example Overpayment writing process

Acceleration of claims processing

**Case study**

Process redesign with targeted automation was performed for one state to meet auditors timeline for submission of 1099 forms

~3X  
Estimated reduction in full time dedicated staff

>5X  
Estimated volume of wage mismatch processed

**Potential impact**

- Leverage existing online portal for employers to submit FD4 and FD5 forms securely and electronically
- Reduce workload for participating employers
- Prepare data for expedited claimants review – removing need for “screen by screen” manual process
- Improve review time (>50%)
- Create extract of reported wage information from employers (SIDES only)
- Create extract of reported wage information from claimants (REME – all claimants) for fast comparison and avoid screen-by-screen navigation
- Automatically send “Do you accept correction?” correspondence to allow auto-adjudication
- Reduce volume of interviews
- Send email to claimant to login and check correspondence
- Display comparison of weeks reported by employers/claimants with Y/N decision button
- Automatically trigger mail notice once Investigate potentially fraudulent overpayment issue is created with lists of wages reported for all weeks with mismatch
- Improve task time (>80%)

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Exhibit 18: Example overpayment writing process flow with opportunities to redesign highly manual tasks.

### Human Centered Design approaches rooted in claimant’s viewpoint to improve their experience with current services

Acceleration of claims processing

We used multiple sources of constituent / claimants insight...

- Quantitative Survey**  
Survey with ~600 claimants to understand experience and challenges
- 1:1 Interviews**  
~10 1:1 interviews to gather in-depth insights and brainstorm opportunities / ideas
- Usability testing**  
Engaged ~10 claimants per round of testing to obtain immediate reaction to proposed solutions

....to quantify pain points across the entire journey from employment to re-employment

**Efficacy of end to end claimant journey**

**Quantified severity of challenges**

**Qualitative understanding of frustrations**

**Unemployment**

- Lack of transparency and communication**  
Application: Low visibility into the filing process and progress leads to a universally shared experience. The system should not expect claimants to know the process and what next steps to take.
- Inconsistent information based on multiple sources of truth**  
Application: The level of service and information varies across the CSR often through their experience and perception of MDOL. Inconsistent or conflicting information from MDOL not only increases user frustration, but can also erode their trust and confidence for across state services.
- Existing system supports UI and does not support changing needs and new situations**  
Application: Claimants are “guessing” how to fill out their forms correctly and questioning how “normal” it is when none of the options apply to them. This leads to errors and potentially putting their benefits at risk.
- Small user errors from poor UX design are magnified in severity**  
Application: The reliance on CSRs to resolve issues increases call volume and backlog, which ultimately leads to longer wait time and delays in payment for claimants. Preventable backlog takes staff time away from claimants who need support.

**Re-employment**

- Remote setting introduces new job search challenges**  
Application: Claimants’ discomfort with new ways of searching, interviewing and working hinders their feeling anxious, unsupported, and not sure how to proceed.
- First-time, professional claimants face career change challenges**  
Application: Claimants feel stuck both geographically and professionally and do not know how to leverage resources from MDOL to change careers or learn new skills.

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Exhibit 19: Human-centered design approaches used to map customer journey and pain points.

### 3.11 Designing New Mexico’s Medicaid Agency of the Future

<p><b>Relevance</b></p>
<p>New Mexico’s 2020 vision for its Health &amp; Human Services was to create a more responsive health and human services delivery and management system to improve the health and well-being of New Mexicans. However, in the face of increasing customer needs and decreasing ease of access to services (e.g., seven websites, five call centers, multiple manual and error-prone processes), the Medical Assistance Division of New Mexico’s Human Services Department (MAD) partnered with McKinsey to launch a comprehensive transformation focused on customer experience. The transformation leveraged the replacement of the IT system managing Medicaid in the State, a federally-mandated project, to holistically redesign its processes with a customer-centric approach – helping create New Mexico’s Medicaid Agency of the Future. Relevance includes diagnostic mapping of interagency service delivery processes, development of customer journey maps, and customer experience-oriented redesign to significantly reduce the end-to-end enrollment process time.</p>
<p><b>Description</b></p>
<ul style="list-style-type: none"> <li>• Created a core transformation team to set strong foundations and clear aspirations for the transformation, assess organizational model and capabilities, support business process redesign, and support implementation of changes</li> <li>• Developed a clear strategy, a joint vision, and compelling change story to help break silos within the organization and focus on how to best serve citizens</li> <li>• Conducted a robust diagnostic which included a full workforce survey on organizational health and management, benchmarking of organizational structure against four other states archetypes, detailed mapping of two primary interagency processes for service delivery, and review of IT systems governance structure</li> <li>• Developed a detailed understanding of the current state, through review of existing documentation of 400+ processes, stakeholder interviews, and workshop</li> <li>• Leveraged best-in-class technology/ design, bringing in senior firm designers to cultivate a design thinking mentality – focusing on journeys to redesign processes and IT functionalities</li> <li>• Through a combination of customer surveys, field research, mystery shopping, and structured live interviews, built a deep attitudinal and demographic understanding of users and their associated needs, behaviors, expectations, motivations, and pain points to develop representative personas</li> <li>• Created “service blueprints,” visualizing the frontstage (user) and back-stage (business operations, IT systems) of a “journey” from a user’s perspective</li> <li>• Conducted redesign workshops leveraging “concept sprints” to identify solution options for prioritized journeys</li> <li>• Established an operating model (e.g., creating a playbook for the Agency to be able to scale up the transformation) and built core capabilities required to sustain</li> </ul>
<p><b>Impact of our work</b></p>
<ul style="list-style-type: none"> <li>• Stood up a cross-bureau <b>business transformation committee</b> across 5 customer-centric tracks to <b>inform system requirements, drive ongoing process redesign, and improve governance for cross-cutting decisions</b></li> <li>• Redesigned 1915(c) process allows families to access the 1915(c) waiver more seamlessly and efficiently and receive the at-home and community-based care they need</li> <li>• Redesigned general eligibility &amp; enrollment process to cut down days to process a new <b>application in half (90 days to 45 days)</b></li> <li>• Redesigning client eligibility and enrollment journeys <b>reduced client application processing time by 20-30% and client touchpoints by up to 50%</b></li> <li>• Automating MCO processes with an expected <b>~50% decrease in time spent reviewing data</b>, allowing more emphasis on insightful reporting</li> <li>• Implementing a restructuring of large program/policy bureau to <b>streamline efficiency and break down operational silos</b></li> </ul>

Work Product Examples

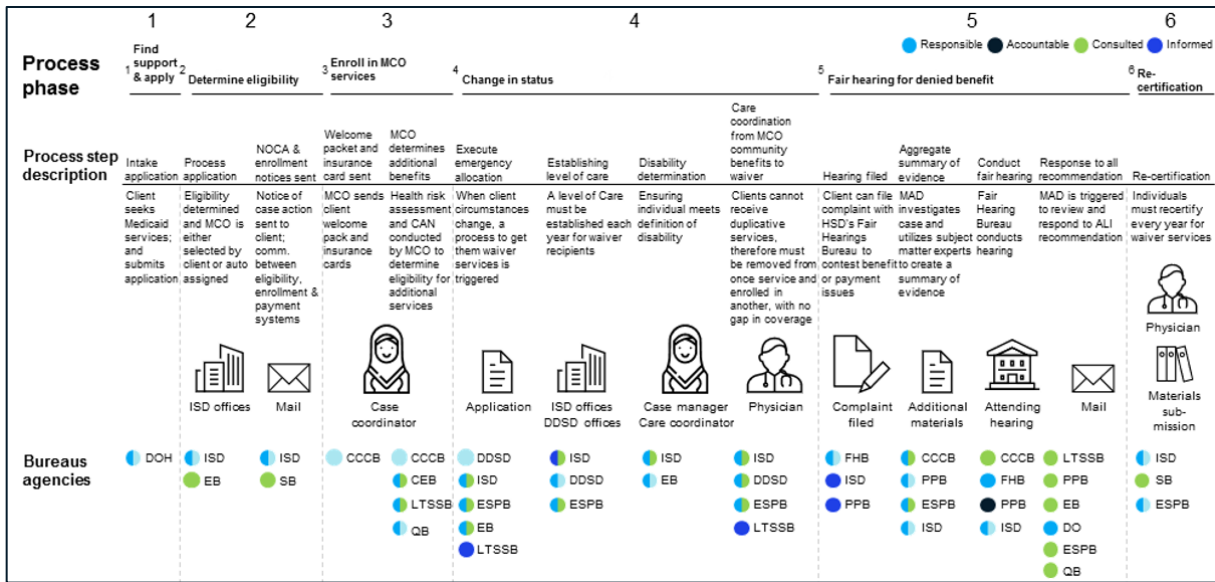


Exhibit 20: Example RACI process map.

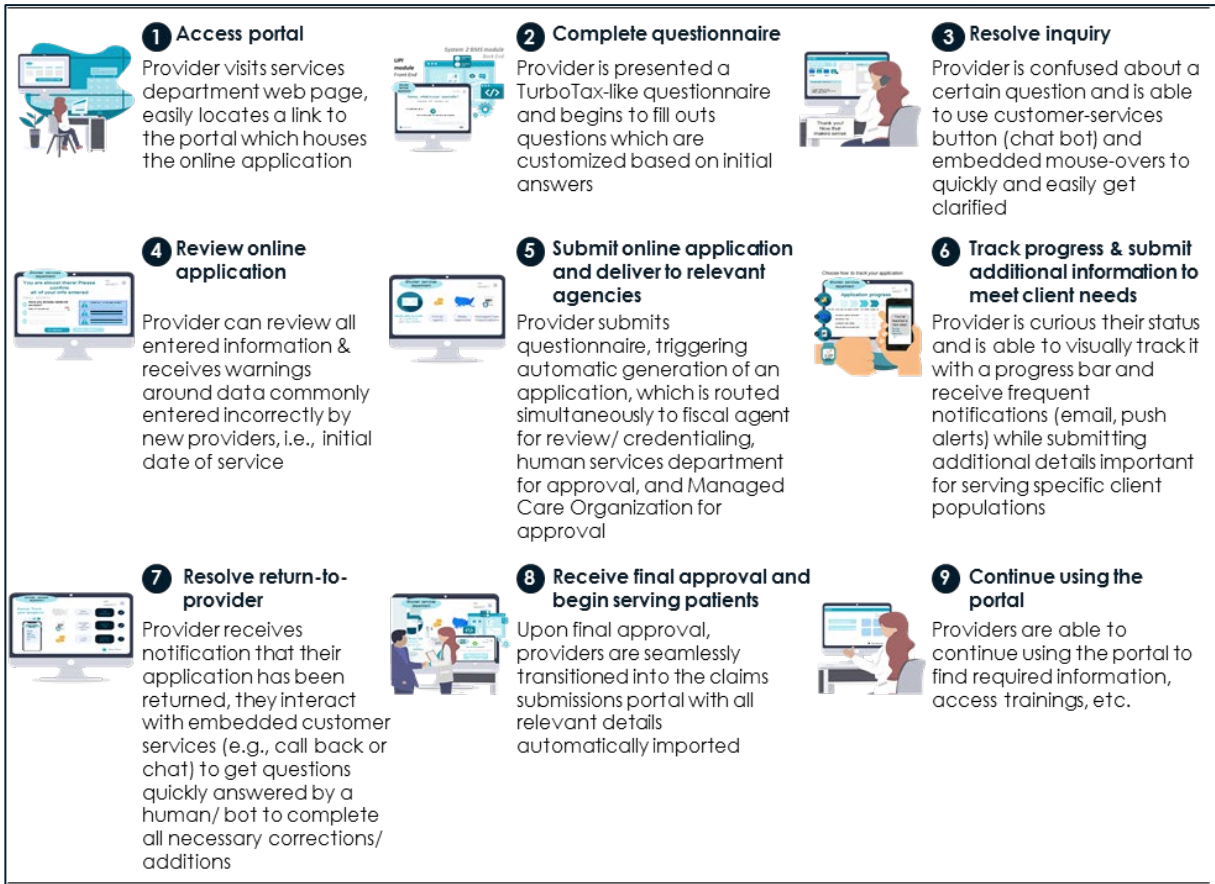


Exhibit 21: "Redesigned Journey Storyboard" output for the provider enrollment journey.

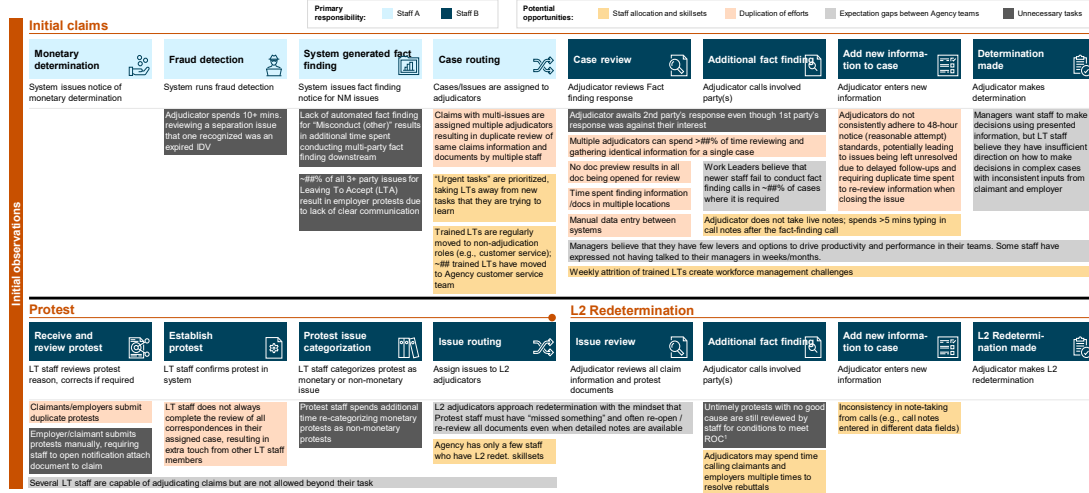
### 3.12 Transforming UI Claimant Experience in a US State

<p><b>Relevance</b></p>
<p>With a US state facing unprecedented challenges related to the pandemic and broader economic development planning, McKinsey provided operations support to help the State’s unemployment insurance agency rapidly address and resolve a large adjudication backlog while also redesigning and improving UI claimant experience, establishing a process for backlog management, and embarking on an agency transformation.</p> <p>Relevance includes detailed process and journey mapping with input from a broad range of stakeholders and development of customer-centric optimization initiatives to improve claimant experience and increase operational efficiency.</p>
<p><b>Description</b></p>
<p>As part of our support, we:</p> <ul style="list-style-type: none"> <li>• Used analytical approaches, service operations expertise, and process diagnostic/optimization (adjudication prioritization, paper and electronic document processing, and call center operations) to develop initiatives to rapidly clear claims backlogs (100Ks in four weeks)</li> <li>• Developed projections for backlog inventory/clearance based on current and improved productivity under different prioritization and staffing plans to optimize impact on backlogs</li> <li>• Launched &gt;20 internal dashboards for daily executive reporting and management of operational processes to establish a single source of truth for leadership</li> <li>• Worked closely with the team of fraud investigators to understand, prioritize, and process significant backlogs of identity verification (IDV) cases</li> <li>• Implemented advanced analytics and machine learning models to identify fraud patterns and improve detection and established an ongoing process for the agency to monitor performance and improve existing fraud detection rules</li> </ul> <p>As part of the transformation effort, we also leveraged our CX expertise to support redesign of claimant journeys and reduce pain points. We:</p> <ul style="list-style-type: none"> <li>• Mapped a set of core citizen/claimant journeys with input from a broad range of stakeholders</li> <li>• Identified key pain points in the customer journey that impacted both CX quality and efficiency (e.g., web chat to reduce UI calls, streamlined call center handling and improved vendor performance and staffing to answer up to 90% of incoming calls)</li> <li>• Suggested and supported the agency in implementing a set of initiatives to improve the experience, including a redesign of the agency’s UI website to improve CX, changes to key claimant communications, and a public dashboard to provide performance transparency</li> </ul>
<p><b>Impact of our work</b></p>
<p>In four weeks, we helped the agency clear &gt;80% of unemployment fraud backlog (IDV) at that time. Within 16 weeks, we helped the agency clear 100% of 2M+ paper backlog in mailroom. The redesigned website and streamlined customer communications helped support reducing call center wait time from 15 to three minutes.</p>

Work Product Examples

# Initial observations across the end-to-end claimant journey from initial claim receipt to adjudication provides insights into operational efficiency

PRELIMINARY AND FOR DISCUSSION PURPOSES



1. ROC: Redetermination of Charges

Source: Agency staff interviews; Agency training materials, observations

McKinsey & Company 16

Exhibit 22: End-to-end claimant journey map and opportunities for operational improvements.

### 3.13 Redesigning a US State’s UI Fraud Operations

<p><b>Relevance</b></p>
<p>McKinsey helped a US State’s unemployment insurance agency redesign identity theft operations to address a spike in UI fraud during COVID-19, including conducting an assessment of fraud maturity and launching new processes and rules to test for fraud.</p> <p>Relevance includes assessment of current state operations to map processes in-depth (~50 steps evaluated), and development of quick-win and longer-term process improvement recommendations with a focus on customer experience.</p>
<p><b>Description</b></p>
<p>With input from the state, we developed a list of high-impact initiatives to improve operational efficiency and address key capability gaps to address a backlog of unemployment claims. Specifically, we:</p> <ul style="list-style-type: none"> <li>• Developed and executed a detailed diagnostic benchmark of dozens of the agency’s program integrity functions vs other states, relative to the ideal state</li> <li>• Identified the major pain points in the current fraud and fraud operations capability and developed a set of initiatives to address them</li> <li>• Developed theft/fraud typologies and identified ways to detect each</li> <li>• Proposed new fraud heuristics and rules and created a weighted fraud scoring system so agency could better balance fraud indicators to determine how to prioritize work</li> <li>• Ran prioritization scenarios and facilitated leadership conversations to enable agency to select a queue management strategy to minimize the impact of backlogs, and transitioned the prioritization approach to agency staff</li> <li>• Launched a comprehensive executive dashboard aggregating key metrics to enable agency to manage performance, make operational decisions, and report to external stakeholders</li> </ul> <p>To improve the CX of claimants engaging with the program integrity function, we focused on ID theft operations. As part of our redesign work, we:</p> <ul style="list-style-type: none"> <li>• Documented current state of ID theft investigation processes and identified pain points</li> <li>• Designed a more efficient process and developed job aids to help guide investigators</li> <li>• Assisted in the development of standard claimant outreach language to improve CX and investigation consistency and efficiency</li> <li>• Redesigned the online form used by informants to report fraud to allow for better information collection</li> </ul>
<p><b>Impact of our work</b></p>
<p>Overall, our work led to a two-fold increase in overpayment backlogs able to be cleared by year end, and a dramatic improvement in the fraud detection rate (from 7% to 30%).</p> <p>Furthermore, in redesigning the ID theft process we improved ID theft investigator productivity by 50% during pilot phase and received consistently positive feedback in weekly surveys of investigators on efficacy and usability.</p>



### 3.14 Conducting a 90-day Review Process of DHS and HRA Operations to Assess Agency Merger

<b>Relevance</b>
While working at NYC City Hall as the Director of Social Services, Kristin Misner-Gutierrez worked with consultants and agencies to look at ways to enhance case management and quality service delivery. They reviewed the organization structure that would best support the city’s efforts to improve overall service delivery while considering staff implications, accountability, and potential efficiencies and cost savings. They did a deep dive into DHS agency operations, looking at prevention, shelter operations, rehousing efforts and aftercare. Relevance includes detailed mapping of complex cross-agency processes, interviews to develop an understanding of experience across stakeholder groups, analysis of gaps, bottlenecks, and challenges, and final recommendations in a consolidated report.
<b>Description</b>
Conducted cross-agency effort to determine whether an agency merger would best support the city’s goal to house homeless individuals and families. Organized and participated in many parts of the work including: <ul style="list-style-type: none"><li>• Stakeholder interviews</li><li>• Site Visits</li><li>• Review and support of process mapping</li><li>• Analysis of challenges</li><li>• Final recommendations and report</li></ul>
<b>Impact of our work</b>
Developed a set of reforms that were ultimately adopted and implemented, leading to the creating of DSS, which included functions from both DHS and HRA. The City estimated potential financial savings from the merger (e.g., “consolidation would save approximately \$38 million through streamlining and the elimination of redundancy among the two agencies that currently manage different stages of moving people out of shelters and into permanent housing.” – <a href="#">NYT, 2016</a> ).



Work Product Examples

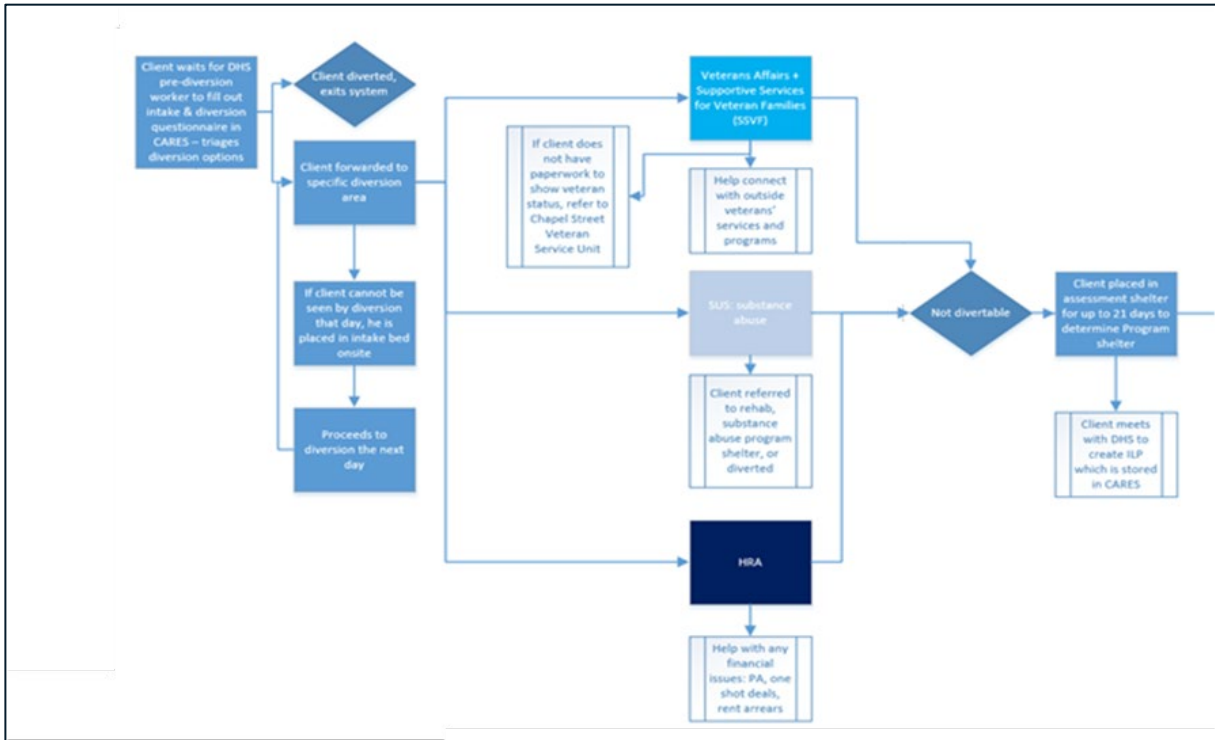


Exhibit 24: Sample flow chart of the DHS diversion efforts at 30th Street Intake.

### 3.15 Implementing a Referral Process to Place Homeless Households into Tax Credit Apartments in NYC

<b>Relevance</b>
In 2016, NYC implemented a policy that allowed homeless households to receive preference for tax credit funded buildings as part of a community preference requirement. Kristin Misner-Gutierrez and her team were responsible for developing a process to successfully move people into those units quickly along with a set of NYC Housing Authority (NYCHA) project-based voucher units. Relevance includes current state operational review of cross-agency processes, analysis of constraints and bottlenecks along the process, and rollout of suggested process optimizations to increase efficiency and improve the client experience.
<b>Description</b>
The Office of Supportive and Affordable Housing and Services, overseen by Kristin Misner-Gutierrez established, through cross-agency collaboration between DHS, HRA and HPD, a process to house homeless households into market rate apartment buildings as part of a new requirement attached to 421a tax credits. There were multiple constraints in place from developers, including a requirement for interviews and separate background checks. The team sought to minimize process steps to best support the rehousing effort. The team conducted an operational review of the current move out process and eliminated all unnecessary requirements. They reviewed and assessed bottlenecks in real time and adjusted the process to accommodate changes. For example, after receiving feedback that tenants missed apartment interview appointments, the team provided transportation services to interviews and with interview preparation.
<b>Impact of our work</b>
Successfully developed workflow and tracking tools to house over 1,200 homeless households into new apartments.

Work Product Examples

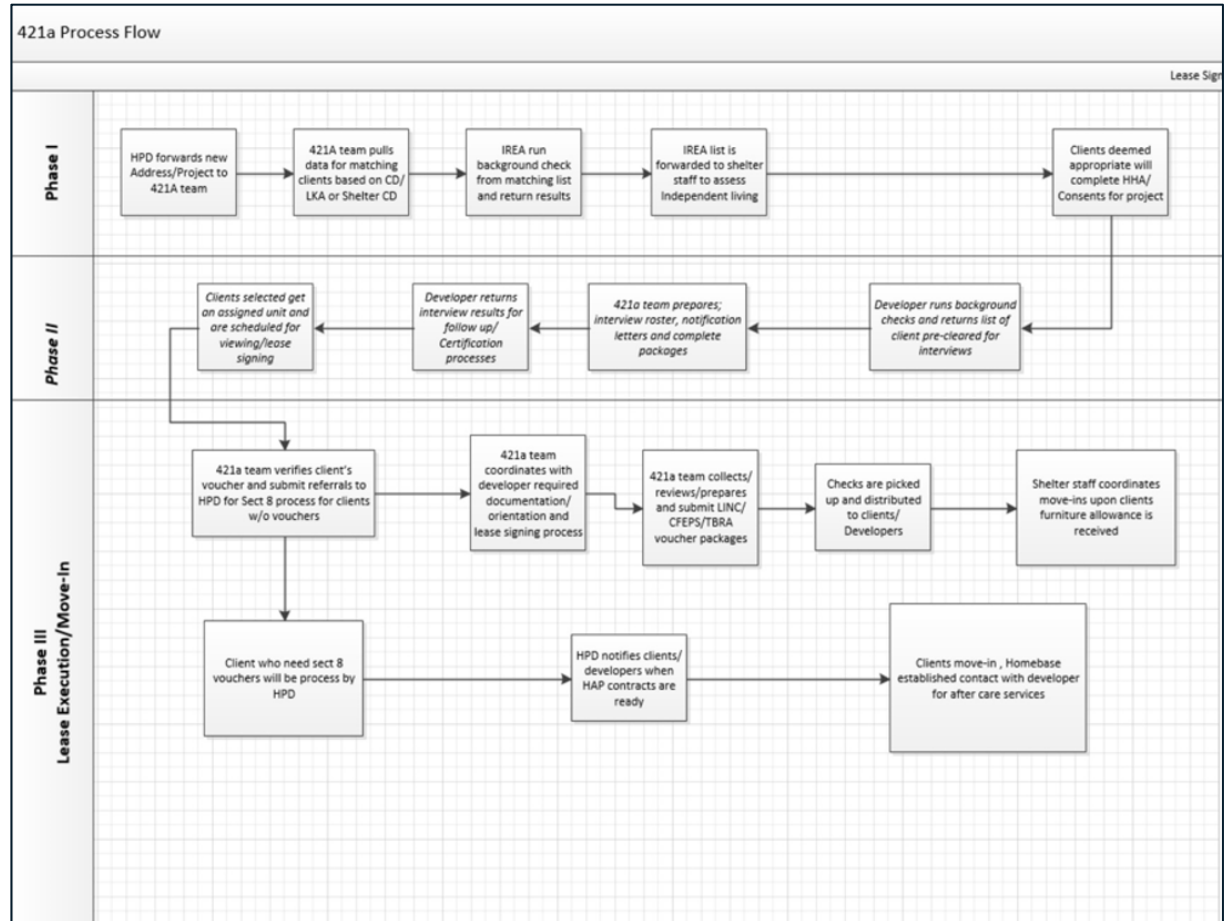


Exhibit 25: Referral process flow chart.

### 3.16 Supporting New Nonprofit in Effort to Improve the NYC Housing Voucher Process

Relevance			
<p>In 2022, KMG Consulting was hired to help with the startup efforts of a new nonprofit in NYC with the goal of transforming the way housing subsidies are utilized to locate and rent available apartments. A key piece of the work included a deep dive analysis into the City FHEPs voucher process and funding streams. Relevance includes experience at the intersection of housing, government, and nonprofit service providers, process analysis, and communication and syndication across government and external stakeholders.</p>			
Description			
<p>Supported nonprofit to operationalize its work including multiple functions:</p> <ul style="list-style-type: none"> <li>Analyze CityFHEPS Process: Understand funding structures and limitations, elements of the process, and resources utilized by the City in implementation of the program</li> <li>Staffing: Recruit and hire for key positions</li> <li>Operations: Draft policy documents, secure insurance, project management</li> <li>Evaluation: Engage evaluators and start theory of change analysis</li> <li>Government Support: Establish and guide ongoing conversations with government stakeholders</li> </ul>			
Impact of our work			
<p>Nonprofit is successfully established as a 501C3 and secured over \$5M in funding to support its efforts.</p>			
Work product examples			
Type of Assistance	Description	Who Receives the Payment	Funding Source
Unit Hold Incentive	A unit hold incentive provides the landlord an additional month's rent when the landlord agrees to accept a DSS client and not lease the unit to anyone else while the application is being processed. There is an HRA Unit Hold Incentive Voucher form that the landlord receives as part of the rental packet. As long as a completed form is included in the rental packet, HRA will provide the incentive payment as part of the leasing checks. The unit hold incentive will be available to the landlord at lease signing.	Landlord	City Tax Levy
Brokers fee (Enhanced)	A broker's fee up to 15% of the annual rent	Broker	Shared Funding
Furniture Allowance	Money to buy essential household furnishings and items if you are moving from a hotel or motel to permanent housing that is unfurnished	Tenant	Shared Funding
Moving Assistance	Money for moving expenses	Mover	Shared Funding
Repairs (pre-move-in)	Funding for minor repairs	N/A	N/A
Special Supplemental Assistance Fund	A Special Supplemental Assistance Fund for landlords can cover up to \$3,000 in repairs or unpaid rent.	Landlord	City Tax Levy
One Shot Deals for Rent	One time assistance to cover overdue rent payments	Landlord	Shared Funding
Security Deposit Voucher	A voucher for the security deposit	Landlord	Shared Funding
4 Months' Rent Paid Upfront	Monthly rental payments	Landlord	City Tax Levy
Monthly CityFHEPS rent payments	Monthly rental assistance payments from HRA renewable annually for five years if tenant continues to meet eligibility requirements and potentially longer	Landlord	City (subsidy portion only, shelter allowance cannot be paid in advance)

**Exhibit 26: Rehousing funding analysis.**

### 3.17 Accelerating the Delivery of Critical Housing and Human Services in the Wake of Hurricane Ian

<p><b>Relevance</b></p>
<p>In its home state of Florida, Indelible provided emergency on-site staffing assistance to the Lee County Division of Emergency Management. Lee County was the epicenter for the devastating impacts of Hurricane Ian. Ian, the 5<sup>th</sup> strongest Hurricane to impact the United States, came ashore with 155mph winds and 12-18’ storm surge, resulting in massive impacts to housing in the area. In the wake of the storm, many residents were faced with homelessness and loss of critical services. However, many residents were either unable to apply for critical services or were unaware/unwilling to apply for available services. Indelible provided staffing assistance to emergency management leadership to improve customer assistance experience, reduce application processing times, quickly process applications, create a grass roots door-to-door outreach campaign to increase participation in the waning hours of critical service funding opportunities.</p> <p>Relevance includes of this project includes assistance to County Emergency Staff to assess the current state of operations, increase efficiency of application processing to decrease processing times for assistance applications, improve customer contact experience for applicants, identify vulnerable population centers, deploy needed outreach through identification of vulnerable population centers, and provide face to face contact with victims in the impacted areas.</p>
<p><b>Description</b></p>
<p>Indelible’s team quickly deployed to Lee County’s Emergency Management Office to assist hurricane victims and impacted veterans facing homelessness in the wake of Hurricane Ian’s devastating impacts (Category 4). Indelible’s team quickly resolved a backlog of needed individual assistance applications for more than 1,100 individuals. Indelible’s role included both process improvement for application resolution and face to face applicant interaction to ensure higher accuracy in addition to increased participation. Indelible’s efforts in direct coordination with Lee County culminated in a grass roots outreach program leading a team of more than 20 individuals providing door-to-door outreach to identify and assist vulnerable and underserved populations. For additional specifics, Indelible supported with:</p> <ul style="list-style-type: none"> <li>• Individual applicant assistance at Lee County Disaster Assistance Centers to identify needs and to fill out assistance application.</li> <li>• Application processing services for FEMA, Veteran and Human Services assistance.</li> <li>• Identifying vulnerable and underserved population centers for potential outreach/survey activity.</li> <li>• Door-to-door outreach in hurricane impacted areas, including on-site application assistance if needed.</li> <li>• Identifying critical service needs for surveyed individuals.</li> </ul>
<p><b>Impact of our work</b></p>
<p>The Indelible Team’s efforts contributed to impact including, e.g.,:</p> <ul style="list-style-type: none"> <li>• Increased capacity and efficiency to resolve backlog of over 1,100 critical assistance applications.</li> <li>• Completed more than 3,100 individual needs surveys, resulting in increased applications and critical services referrals.</li> </ul>

Work Product Examples

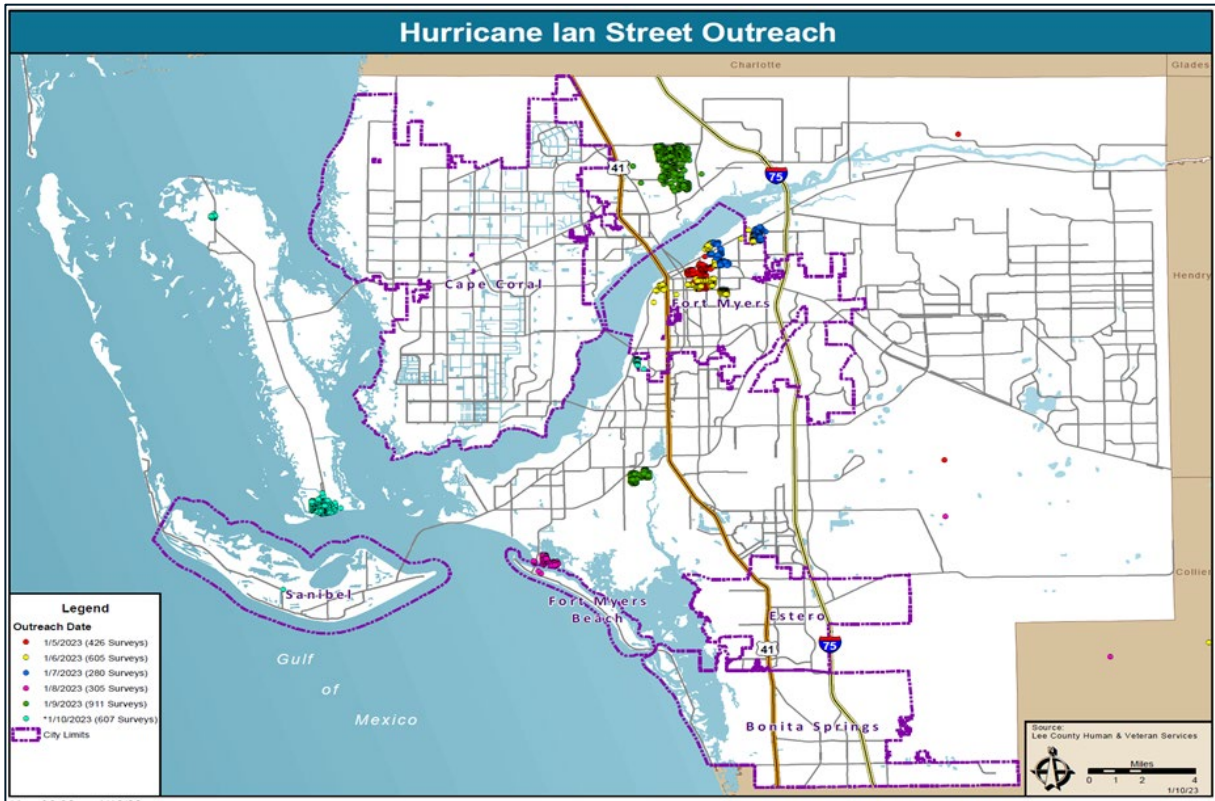


Exhibit 27: Outreach conducted by the Indelible team across Lee County in the wake of Hurricane Ian.

## 4.0 Proposed Project Plan

We propose structuring the core of the workplan in three phases over ten weeks. Leading up to and throughout these three phases, McKinsey will assume responsibility for end-to-end project management including coordination across City stakeholder groups and leadership, as outlined in **Task 1** of the Project Understanding and Approach. The three phases of work align to **Tasks 2-4** and include:

- **Phase 1 – Current State Assessment (Weeks 1-4):** Develop a journey map of the homeless placement process that synthesizes administrative complexities, outlines estimated timeframes, and describes how information flows between steps (**Task 2**)
- **Phase 2 – Prioritized Opportunities for Improvement (Weeks 5-6):** Formulate up to ten options for City consideration that dramatically reduce the housing placement process time, improve the client experience, reduce redundancies, and increase efficiency, along with an estimate of time and other resources savings as well as other enablers needed (**Task 3**)
- **Phase 3 – Syndication and Communications (Weeks 7-10):** Help inform the creation of presentation collateral and a syndication plan around the effort to assist HDC in messaging (**Task 4**)

Understanding the urgency of this effort, we will jump-start the engagement with a “Phase 0” week in which we will conduct a disciplined project kick-off, align on the workplan, and consolidate data requests. A dedicated McKinsey Project Manager will quarterback the project management effort with guidance and oversight from our leadership team. This function will be responsible for consolidated journey map(s), a synthesis of current gaps in the process, and options for City consideration detailed in Tasks 2 and 3 into a consolidated final report after six weeks. From there, support will continue for four additional weeks to help with the development of presentation collateral and further syndication, as detailed in Task 4. The cadence for updates and governance cadence will be jointly aligned with HDC and HPD leadership, but we propose (1) weekly check-ins with leadership to ensure alignment on priorities and (2) briefings to a Steering Committee at the end of Phases 1 and 2.

Our proposed project plan for each Phase is as follows:

- **Phase 1 – Current State Assessment:** Develop a journey map of the homeless placement process that synthesizes administrative complexities, outlines estimated timeframes, and describes how information flows between steps (**Task 2**). This Phase will span the first four weeks of the project:
  - **Week 1:** We will spend the first week of the project reviewing and building on the existing draft process flow analysis conducted by the City. We will first ensure a robust understanding of the existing baseline and analysis through interviews with Task Force leads and analytic support staff. Then we will identify gaps in the baseline and align those gaps to potential sources of insight (e.g., stakeholder interviews, publicly available data, etc.). Once we have built this understanding, our team will rapidly develop preliminary perspectives on where the City can achieve the biggest potential operational gains, resulting in a “Week 1 Answer” delivered at the end of the first week of the effort. Also in Week 1, we will perform necessary setup activities such that we can launch our proprietary *Journey Pulse Survey* during Weeks 2 and 3. We will also develop interview guides and begin identifying participants, scheduling, and preparing for focus group meetings and interviews in Weeks 2 and 3.
  - **Weeks 2 and 3:** We will then augment the existing process baseline with input from relevant stakeholders throughout the placement process. Starting in Week 2, we will conduct approximately 3-5 focus group meetings and 10-15 stakeholder interviews to

gather critical process details and perspectives missing from our baseline. We will also use these focus group meetings and interviews to pressure-test existing hypotheses as well as generate new ones. Furthermore, starting in Week 2 we can deploy our *Journey Pulse Survey* to gain insight into drivers of satisfaction, unmet needs, and pain points among a large sample of stakeholders in the placement journey. A synthesis of the feedback heard in focus group meetings and insights generated from our *Journey Pulse Survey* can help close process detail gaps in the existing baseline developed and shed light on opportunities for improvement. By the end of Week 3, we will deliver a synthesis of takeaways from focus group meetings and interviews with key stakeholders.

- **Week 4:** We will spend our last week of Phase 1 synthesizing inputs from the prior weeks into a current state assessment that includes three key deliverables. First, we will develop an integrated process map output that visualizes the end-to-end housing placement process, cataloging processes and sub-processes and the policies, systems, information flows and timing at each step. Second, we will create customer journey maps that distill the different experiences, pain points, and drivers of satisfaction along the process across multiple stakeholder perspectives. We will then begin to identify areas of redundancy and opportunities to improve efficiency and experience, including gaps in the process that create unintended barriers for persons experiencing homelessness. We will finalize and share these deliverables by the end of Week 4. Furthermore, since we will have already started developing and refining hypotheses for operational improvements as early as Week 1, we may have potential “no-regrets” options for City consideration to action as early as Week 4.
- **Phase 2 – Prioritized Opportunities for Improvement:** Formulate up to ten options for City consideration that dramatically reduce the housing placement process time, improve the client experience, reduce redundancies, and increase efficiency, along with an estimate of time and other resources savings as well as other enablers needed (**Task 3**). Starting in **Week 5** we will start to develop and refine up to ten options to improve the housing placement process for consideration by the City. We will assess the feasibility and estimate the potential impact of each opportunity identified to help the Task Force prioritize the most important gaps and challenges to address. Following that prioritization, we will orchestrate a rapid “design sprint” to reimagine the future state process and identify potential options to reach that future state. The sprint will deploy best practice design thinking principles and will require a broad audience of relevant HPD, HDC, and other stakeholders. The sprint will help ensure options account for a wide range of perspectives and include enabling changes needed in program design, technology, processing, and staffing models. To further ensure options account for all participant experiences, we will analyze the impact of the options from multiple stakeholder perspectives (e.g., tenant applicants, caseworkers supporting tenants, and building marketing agents processing applications). With one additional week for pressuring-testing of insights, synthesis, and codification, we will finalize and share potential options for consideration and analysis of stakeholders’ experiences of the process in a consolidated final report by the end of **Week 6**.
- **Phase 3 – Syndication and Communications:** Help inform the creation of presentation collateral and a syndication plan around the effort to assist HPD and HDC in messaging (**Task 3**). From **Weeks 7-10**, we will use the stakeholder mapping and analysis of stakeholder perspectives on potential options developed to help the Task Force tailor presentation materials to speak to different stakeholder groups. We will help HPD and HDC test and refine these materials with focus groups, agency leaders, and others to ensure they are as robust as possible. We will provide leadership counseling on the go-forward syndication plan and potential owners beyond our engagement to ensure the impact we identify can be realized.



## Proposed high-level approach

Phase	Task	Major activities	Deliverables
<b>Cross-cutting</b>	<b>1. Project management</b>	<ul style="list-style-type: none"> <li>Weekly check-ins with Task Force leadership to ensure alignment on priorities</li> <li>Steering Committee briefings at the conclusion of Phases 1 and 2</li> </ul>	Final consolidated report
<b>Phase 1: Current State Assessment</b>	<b>2.1 Review existing baseline</b>	<ul style="list-style-type: none"> <li>Understand <b>existing process baseline</b> by reviewing City analysis and interviewing relevant City stakeholders; <b>identify gaps</b> in existing baseline and map sources of insight</li> <li>Build <b>interview guides</b> and begin identifying participants and scheduling focus groups</li> <li>Develop <b>preliminary hypotheses</b> on efficiency opportunities</li> </ul>	“Week 1 Answer”
	<b>2.2. Supplement baseline with focus group meetings and interviews</b>	<ul style="list-style-type: none"> <li>Conduct <b>focus group meetings and stakeholder interviews</b>, and synthesize insights and feedback to close process detail gaps in existing baseline and refine initial hypotheses</li> <li>Launch <b>McKinsey Journey Pulse Survey</b> to gain insight into drivers of satisfaction, unmet needs, and pain points</li> </ul>	Synthesis of takeaways from focus groups meetings and stakeholder interviews
	<b>2.3. Map the end-to-end placement journey</b>	<ul style="list-style-type: none"> <li>Create an <b>integrated process map</b> visualizing the end-to-end placement process with information flows and cycle times, highlighting gaps in the process that create unintended barriers for homeless households, areas of redundancy, and opportunities for efficiency</li> <li>Build <b>differentiated journey maps</b> based on various stakeholders’ experiences, as needed</li> </ul>	Process map and customer journey map(s) with gaps and optys identified
<b>Phase 2: Prioritized Opportunities for Improvement</b>	<b>3. Formulate up to ten options for City consideration</b>	<ul style="list-style-type: none"> <li>Develop <b>framework</b> to assess the <b>feasibility and estimated impact</b> of all opportunities identified, to help prioritize focus areas</li> <li>Conduct a <b>Design Sprint</b> to ideate future state needs across prioritized opportunities</li> <li>Analyze options from multiple <b>stakeholder perspectives</b> (e.g., differences in impact, needs)</li> </ul>	Up to 10 options for City consideration; Analysis of stakeholder perspectives on options
<b>Phase 3: Syndication &amp; Communications</b>	<b>4. Help inform creation of presentation collateral and syndication plan</b>	<ul style="list-style-type: none"> <li>Support the Task Force in developing <b>tailored presentation materials</b> that speak to all relevant stakeholders</li> <li><b>Test and refine materials</b> with focus groups, agency leaders, and others</li> <li>Provide leadership counseling on <b>go-forward syndication plan</b></li> </ul>	Supporting the development of presentation collateral; Supporting during internal syndication

**Exhibit 28: Overview of approach and deliverables.**

# Proposed high-level workplan

Workstream and activities	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10
<b>Cross-cutting – Overall project management and report consolidation (TASK 1)</b> Weekly check-in with Task Force leadership Steering Committee briefing	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
<b>Phase 1 – Current State Assessment:</b> Develop a journey map of the homeless placement process that synthesizes administrative complexities, outlines estimated timeframes, and describes how information flows between steps <b>(TASK 2)</b> <b>2.1:</b> Review the existing housing placement process baseline, including the draft process flow analysis conducted by the City <b>2.2:</b> Supplement baseline with process details that incorporate feedback from focus group meetings and stakeholder interviews <b>2.3:</b> Map the end-to-end placement journey with information flows and cycle times, and highlight gaps, redundancies, and likely improvement opportunities										
<b>Phase 2 – Prioritized Opportunities for Improvement:</b> Formulate up to ten options for City consideration that dramatically reduce the housing placement process time, improve client experience, reduce redundancies, and increase efficiency, along with an estimate of time and other resources savings as well as other enablers needed <b>(TASK 3)</b>	<p><i>Our team will take a hypothesis-driven approach to iterate on potential options early on, although dedicated work for Phase 2 will not begin until week 5</i></p> <p><i>We will conduct a Design Sprint in week 5</i></p>									
<b>Phase 3 – Syndication and Communications:</b> Help inform the creation of presentation collateral and a syndication plan around the effort to assist HDC in messaging <b>(TASK 4)</b>										

Exhibit 29: Overview of workplan.

## 5.0 Engagement Letter/Contract

For public sector contracts, McKinsey traditionally uses the client entity's standard contract. We have extensive experience working within NYC's standard contractual provisions.

## 6.0 Proposed Budget with Detailed Breakdown

In both the public and private sectors, McKinsey works on a firm fixed price (FFP) basis. Rates reflect the specific mix of skills, roles, and experience required for engagements and are inclusive of full-time project staff; leadership and experts; and research and administrative support. This integrated set of resources is designed to provide HDC with technical expertise and offer executive-level advice, in-depth private and public sector expertise, and quantitative and qualitative analysis. Within the agreed price, we commit to deliver the agreed services and deliverables—adding resources, if necessary, at no additional cost—to ensure delivery of the work.

Our approach to pricing reflects our commitment to bring the best of our firm to each engagement, and to provide a flexible, integrated approach to supporting clients on important and complex issues. Our dedicated engagement team may draw upon our firm’s extensive expertise throughout the engagement. The FFP program lends itself to our policy of leveraging the full set of capabilities of our firm—rather than the capabilities of select individuals—in each of our efforts. It ensures that our clients receive the high-quality support they need, and that we bear the risk of delivering the promised results at the quoted price.

Deliverables	Weeks to complete	Price
<b>Current State Assessment:</b> <ul style="list-style-type: none"> <li>Process map of the homeless placement process outlining estimated timeframes, information flows, and administrative complexities</li> <li>Synthesized takeaways from interviews with key stakeholders that include agency leaders and staff, applicants, caseworkers, and building marketing agents</li> <li>Customer journey map of participants’ experience across the housing placement process, highlighting key pain points and top drivers of satisfaction</li> <li>Identification of areas of redundancy and opportunities to improve efficiency and participants’ experience, including gaps in the process that create unintended barriers for persons experiencing homelessness</li> </ul>	4 weeks	\$800,000
<b>Prioritized Opportunities for Improvement:</b> <ul style="list-style-type: none"> <li>Up to ten options for HPD to consider to dramatically reduce the time it takes to place DHS shelter residents into permanent housing financed or assisted by HPD and HDC</li> <li>Stakeholder analysis of the impact of each option across multiple client perspectives: tenant applicants, caseworkers supporting tenants, and building marketing agents processing applications</li> </ul>	2 weeks	\$200,000
<b>Syndication and Communications:</b> <ul style="list-style-type: none"> <li>Supporting the development of collateral for continued syndication across different stakeholder groups</li> <li>Supporting during internal syndication</li> </ul>	4 weeks	\$200,000
<b>Total</b>	<b>10 weeks</b>	<b>\$1,200,000</b>

# 7.0 RFP Appendix Documents


## 7.1 Equal Employment

**EQUAL EMPLOYMENT OPPORTUNITY  
STAFFING PLAN**  
Submit with Bid or Proposal – Instructions on page 2

<b>Solicitation/Program Name:</b> New York City Housing Development Corporation (HDC) and the New York City Department of Housing Preservation and Development (HPD) Homeless Housing Placements Evaluation	<b>Report includes:</b> <input type="checkbox"/> Workforce to be utilized on this contract <input checked="" type="checkbox"/> Contractor/Subcontractor's total work force
<b>Offeror's Name:</b> McKinsey & Company, Inc. Washington D.C. <b>Offeror's Address:</b> 1200 19th Street NW, Suite 1000, Washington, DC 20036	<b>Reporting Entity:</b> <input checked="" type="checkbox"/> Contractor <input type="checkbox"/> Subcontractor <b>Subcontractor's name</b> _____

Enter the total number of employees for each classification in each of the EEO-Job Categories identified

EEO-Job Category	Total Work force	Workforce by Gender		Work force by Race/Ethnic Identification														
		Total Male (M)	Total Female (F)	White (M) (F)		Black (M) (F)		Hispanic (M) (F)		Asian (M) (F)		Native American (M) (F)		Disabled (M) (F)		Veteran (M) (F)		
Officials/Administrators	36	21	15	18	15	2				1								
Professionals	24	17	7	10	5				1	4	1							
Technicians																		
Service Maintenance Workers																		
Office/Clerical	36	3	33	1	6	2	16		3		1							
Skilled Craft Workers																		
Paraprofessionals																		
Protective Service Workers																		
<b>Totals</b>	<b>96</b>	<b>41</b>	<b>55</b>	<b>29</b>	<b>26</b>	<b>4</b>	<b>16</b>		<b>4</b>	<b>5</b>	<b>2</b>							

PREPARED BY (Signature): 	TELEPHONE NO.: 202-662-0093	DATE: 02/22/2023
NAME AND TITLE OF PREPARER (Print or Type): Tony D'Emidio, Partner	<b>SUBMIT COMPLETED WITH BID OR PROPOSAL</b>	

**General instructions:** All Offerors and each subcontractor identified in the bid or proposal must complete an EEO Staffing Plan and submit it as part of the bid or proposal package. Where the work force to be utilized in the performance of the State contract can be separated out from the contractor's or subcontractor's total work force, the Offeror shall complete this form only for the anticipated work force to be utilized on the State contract. Where the work force to be utilized in the performance of the State contract cannot be separated out from the contractor's or subcontractor's total work force, the Offeror shall complete this form for the contractor's or subcontractor's total work force.

**Instructions for completing:**

1. Enter the Solicitation number or RFP number that this report applies to along with the name and address of the Offeror.
2. Check off the appropriate box to indicate if the Offeror completing the report is the contractor or a subcontractor.
3. Check off the appropriate box to indicate if the work force being reported is just for the contract or the Offerors' total workforce.
4. Enter the total work force by EEO job category.
5. Break down the total work force by gender and enter under the heading 'Workforce by Gender'
6. Break down the total work force by race/ethnic background and enter under the heading 'Work force by Race/Ethnic Identification'. Contact the Designated Contact(s) for the solicitation if you have any questions.
7. Enter information on disabled or veterans included in the work force under the appropriate headings.
8. Enter the name, title, phone number and email address for the person completing the form. Sign and date the form in the designated boxes.

**RACE/ETHNIC IDENTIFICATION**

Race/ethnic designations as used by the Equal Employment Opportunity Commission do not denote scientific definitions of anthropological origins. For the purposes of this report, an employee may be included in the group to which he or she appears to belong, identifies with, or is regarded in the community as belonging. However, no person should be counted in more than one race/ethnic group. The race/ethnic categories for this survey are:

- **WHITE** (Not of Hispanic origin) All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.
- **BLACK** a person, not of Hispanic origin, who has origins in any of the black racial groups of the original peoples of Africa.
- **HISPANIC** a person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.
- **ASIAN & PACIFIC ISLANDER** a person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent or the Pacific Islands.
- **NATIVE INDIAN (NATIVE AMERICAN/ ALASKAN NATIVE)** a person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliation or community recognition.

**OTHER CATEGORIES**

- **DISABLED INDIVIDUAL** any person who:
  - has a physical or mental impairment that substantially limits one or more major life activity(ies)
  - has a record of such an impairment; or
  - is regarded as having such an impairment.
- **VIETNAM ERA VETERAN** a veteran who served at any time between and including January 1, 1963 and May 7, 1975.
- **GENDER** Male (M) or Female (F)

## 7.2 Minority and Women Owned Business Enterprise (MWBE)

For McKinsey, diversity and inclusion are critical to achieving our dual mission—to help our clients make substantial, lasting performance improvements and to build a firm that attracts, develops, excites, and retains exceptional people and partners. To get the best answers for our clients, we require people with varied perspectives and backgrounds who feel comfortable sharing their views. For this reason, diversity and inclusion, including supplier and partnership diversity, is built into our day-to-day operations. Wherever possible, our policy and practice is to source and procure goods and services from small, minority-owned, woman-owned, veteran owned, and other diverse businesses.

In order to maintain this policy, McKinsey's procurement team manages the following core components of its supplier diversity program:

- **Outreach:** Conduct outreach efforts by joining and collaborating with various trade associations and attend business conferences/trade fairs to actively seek diverse suppliers.
- **Inclusion:** Ensure that diverse businesses have fair access to McKinsey bids when appropriate.
- **Development:** Work with diverse suppliers to ensure requirements and standards are clearly communicated and understood so that diversity suppliers are successful as McKinsey vendors.
- **Qualification:** Screen diverse suppliers to ascertain if a match exists between suppliers' capabilities and McKinsey's current and/or future needs and ensure that supplier has appropriate certification.

Further, to better ensure success, we believe it is important to have a local perspective on our engagements and are also committed to supporting the local economy and community wherever possible. To that end, we utilize members of our team to identify that we are working with the right local partners to deliver the best outcomes for our clients.

## 7.3 NYC Location

### 7.3.1 NYC Office Information

McKinsey has offices located at four NYC locations:

- **195 Broadway** (195 Broadway Fl. 19, New York, NY 10007)
- **3WT** (175 Greenwich Street, Three World Trade Center Fl. 60-64, New York NY 10007)
- **711 Third** (711 Third Avenue, Fl. 4, New York NY 10017)
- **Caserta** (501 Fifth Ave, New York, NY 10017)

Collectively, our NYC offices have approximately 2,750 colleagues. We have not relocated any employees from offices in NYC to locations outside NYC since January 1, 2017, and we have no plans to do so in the next two years.

### 7.3.2 Corporate Citizenship and Commitment to NYC

NYC is home to McKinsey's largest office, with over 2,750 colleagues. It is also one of our oldest; the office celebrated its 90th anniversary in 2022. Our New York Office serves a range of leading companies across financial services, healthcare, technology, media, public sector, and more. Through our client service, extensive pro-bono work, and network of over 3,000 McKinsey alumni in the metro area, we play an integral role in New York's sustainable and inclusive growth.

Our commitment to the City is *"To make lasting and substantial contributions to New York's global pre-eminence. With bold action to support inclusive growth, health and wellness, innovation and technology, and sustainability, McKinsey New York will be doing our part in building a stronger and more resilient city/state"* and we have several signature initiatives to help achieve these goals.

In early 2022, NYO kicked off the 'New' New York Blue Ribbon Panel, sponsored by Governor Hochul and Mayor Adams, to develop the strategy to build New York's inclusive economic recovery. McKinsey supported in gathering and analyzing data and providing fact-based analyses to inform the Panel on NYC's economic context across topics such as the health of commercial real estate, foot traffic levels in CBDs, NYC employment trends, NY transit usage, and implications on inclusiveness for all New Yorkers. With McKinsey's help, the City and the Panel have held over 100 meetings with expert stakeholders to develop dozens of potential initiative ideas to accelerate New York's recovery, help return to pre-pandemic employment levels more quickly, and build NY back more inclusively than ever.

In November 2022, McKinsey New York also hosted the 'Future of New York Summit', convening an esteemed group of private sector CEOs, nonprofit heads, academic and think tank leaders, and city/state government officials, to celebrate NYC and brainstorm ideas for how this group could commit to making the city stronger economically and culturally for its next phase of growth.

For our work with women-owned, minority and small business enterprises - we launched *InNYC* in 2022— an accelerator to promote inclusive innovation by helping underrepresented founders of New York's best tech start-ups tackle their toughest challenges. The inaugural cohort worked with three minority women-owned start-ups in New York across diverse industries to help accelerate growth through dedicated support and incubation.

As part of our broader community efforts, we also launched the *BUILD* program in 2022 - a 2-year rotational opportunity providing recent or upcoming university graduates from New York public colleges and universities with real world professional experience across various pathways



at the firm. This program is in partnership with the *NY CEO Jobs Council*, which we co-chair, to affirm our commitment to hiring from the city. Some of our leaders also partner with “*Project Renewal*”, a nonprofit that works to end the cycle of homelessness by empowering at-risk New Yorkers to renew their lives with health, homes and jobs in a counseling capacity for a broad range of topics -- from advising on Project Renewal's strategy, building new capabilities to engage the private sector, to improving the board and top-team effectiveness.

We also have an extensive pro-bono and charitable presence in New York. We served five nonprofits (Friends of Governors Island, Robin Hood Foundation, LGBT Center, 92Y, and KACF) on a pro-bono basis in 2022 delivering ~3,400 hours of service and donating \$3.8M for charities via firm-match McK Gives Benevity donations, and McKinsey Grants. We work with GreaterNY to sponsor 1:1 leadership counseling between our firm's leaders as well as executive directors of NYC-based nonprofit organizations. Our New York Office also has one of the most successful employee volunteering programs, offering a selection of service opportunities each month, spotlighting different local nonprofits in the City. In 2022, we saw incredible impact and engagement throughout our office with nearly 1,000 hours of service from 798 colleagues working with 35 nonprofits. Through these volunteering activities McKinsey New York has donated \$72K to participating organizations. Lastly, we serve on the boards of 64 nonprofit organizations, including recently added the Ad Council, Citizen Budget Commission, Federal Reserve Bank, NYC Ballet, The Kauffman Center, The Public, University Hospital Fund of NYC and Valerie Fund.

## 7.4 Local Law 34 Compliance (Doing Business Data Form)

We have provided a completed Doing Business Data Form as a separate attachment with our submission.

## 8.0 Conflict of Interest Information

McKinsey & Company, Inc. Washington D.C. (“McKinsey DC”) primarily serves public sector clients, with some social sector and commercial client work. Per reference the applicable RFP, contract, or FAR provision, we are not aware of any McKinsey DC work that poses a conflict of interest. For additional transparency, we note that McKinsey & Company, Inc. United States (“McKinsey US”), an affiliate, provides or has provided consulting services in the US to commercial institutions across all industries, including construction equipment & technology, private financial institutions (including mortgage lenders), real estate companies (including owners, operators, and developers), banking institutions (including retail banking, consumer credit (mortgage and unsecured lending)), engineering, construction & building materials (including building materials & products, construction services, architecture & engineering services), energy, hotels, hospitality, technology, telecommunications, and real estate. McKinsey US’s consulting services include analysis, advice, and implementation support across many areas of business, including sales, marketing, operations (including digitization, automation, process improvements & efficiency, procurement), strategy, corporate finance, organization, risk, technology, transformation (including helping companies significantly change their performance trajectory by reducing costs (e.g., procurement, labor, fixed costs, and footprint) and/or driving growth (e.g., acquisitions, divestitures, new investments, and footprint)), mergers & acquisitions topics (including merger strategy, due diligence, integration planning, divestiture planning, IPOs, JVs & alliances), and sustainability. McKinsey DC does not believe this creates a conflict of interest based on our scope of work, which is to improve the internal homeless placement process. Furthermore, McKinsey DC will not provide recommendations about specific housing options. McKinsey DC does not generally hold ownership interests in their clients, but we note that other affiliates may hold ownership interests in clients across various industries.

## 9.0 Assumptions

McKinsey & Company, Inc. Washington D.C.'s ("McKinsey DC") approach to providing the services proposed hereunder ("Services") and the corresponding pricing are based on the following assumptions, which are requested to be incorporated into the final contract.

1. McKinsey's FFP budget provided is neither based on a cost build-up nor the application of indirect costs to McKinsey's direct labor costs. As McKinsey does not bid on or perform any cost-type contracts, McKinsey will exclusively perform these services on an FFP basis.
2. McKinsey does not provide categorical recommendations on matters of public policy; but rather, provides fact-based analysis and framing of options and tradeoffs; all authority for policy decisions shall continue to reside with NYC HDC/HPD.
3. Analysis will exclude downstream health and safety impacts of housing process changes.
4. To promote true neutrality on issues, provide an environment for uncensored guidance for our clients, ensure compliance with our contract confidentiality requirements, and better empower our clients, McKinsey does not advocate, present findings, or consent to public references in any public meeting, writing, or other public forum. Consistent with this, McKinsey does not make public client names, client materials, or reports prepared for clients without their prior written permission.
5. The services shall not be deemed medical, investment, legal, tax, accounting or other regulated advice, such as professional advice normally provided by licensed or certified practitioners, and do not constitute policy advice. McKinsey does not supplant NYC HPD/HDC's management or other decision-making bodies and does not guarantee results. McKinsey's services are an extension of and supplement to the government functions performed by NYC HDC/HPD. NYC HDC/HPD remains solely responsible for their decisions (including policy decisions), actions, use of the deliverables furnished hereunder and compliance with applicable laws, rules, and regulations.