



9. Development Team Experience and Capacity Review

1627 WESTERN AVENUE, CINCINNATI, OHIO 45214

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CINCINNATI METROPOLITAN HOUSING AUTHORITY



MARIANNA TERRACE OWNERSHIP STRUCTURE

Cincinnati Metropolitan Housing Authority (CMHA)
Fee Owner, Ground Lessor, RAD grantor
EIN: 31-6000188
Board of Commissioners: Chairman William Myles; Vice-Chair Mayme LaVerne Mitchell; Thomas J. Weidman; Reginald J. Harris; Kevin M. Moore; Edward R. O'Donnell; Teri Spears

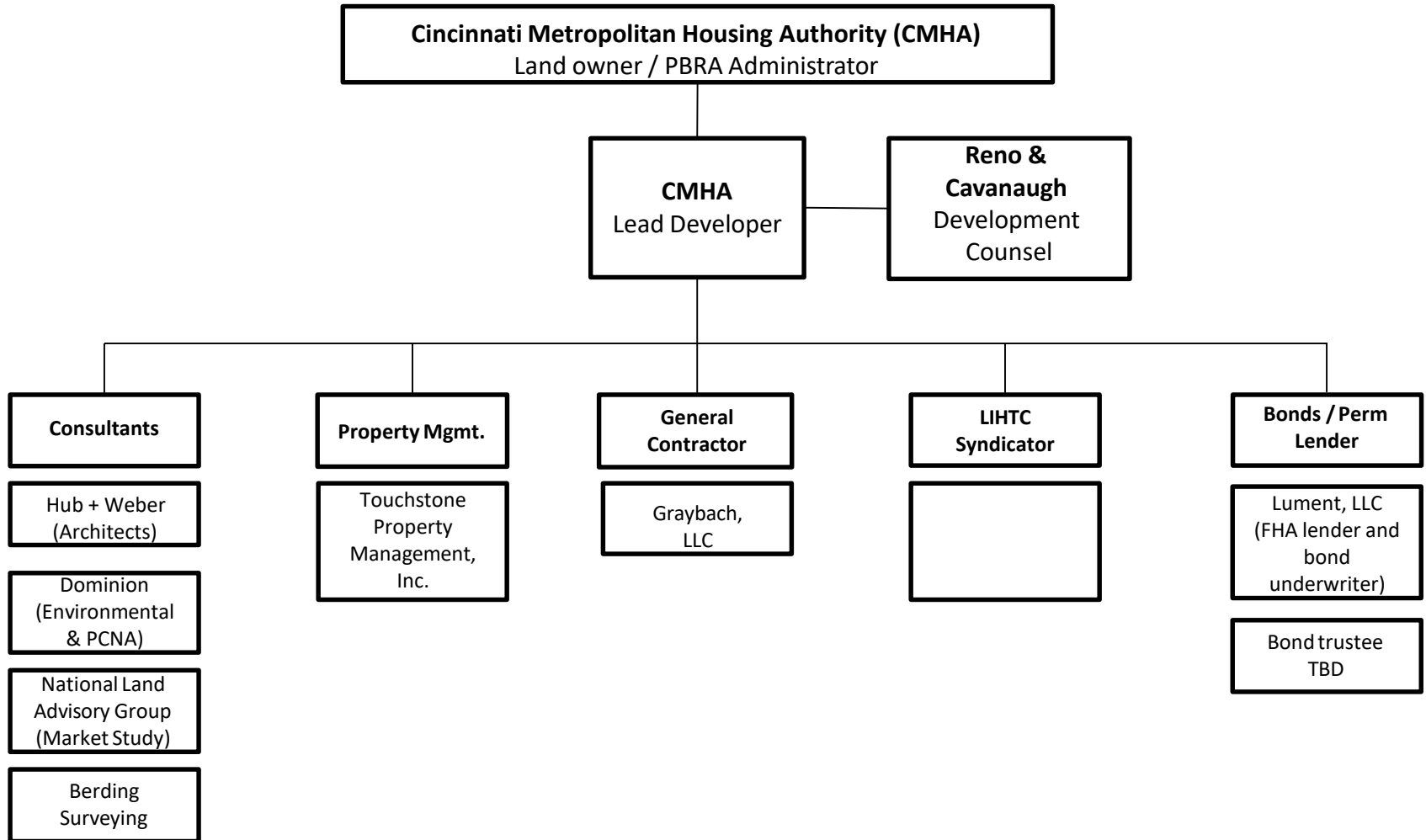
Marianna Terrace, LLC
Leasehold Owner
EIN: 85-2846397

Marianna TerraceDevelopment Corp.
.1% Managing Member
EIN: 85-2867354
Board of Commissioners: Chairman William Myles; Vice-Chair Mayme LaVerne Mitchell; Thomas J. Weidman; Reginald J. Harris; Kevin M. Moore; Edward R. O'Donnell; Teri Spears
Secretary: Gregory D. Johnson
Treasurer: Reema Ruberg

OEF Investment Fund, LLC
Investor Member
99.9%

CMHA
Sole member
100%
Board of Commissioners: Chairman William Myles; Vice-Chair Mayme LaVerne Mitchell; Thomas J. Weidman; Reginald J. Harris; Kevin M. Moore; Edward R. O'Donnell; Teri Spears

MARIANNA TERRACE DEVELOPMENT TEAM



AFFORDABLE HOUSING FOR HAMILTON COUNTY FAMILIES

EXPERIENCE IN ALL PHASES OF RESIDENTIAL DEVELOPMENT

Since 1933, the Cincinnati Metropolitan Housing Authority (CMHA) has worked to meet the housing needs of Hamilton County residents of all walks of life, of every age and of every socioeconomic strata. As the 17th largest Public Housing Authority in the United States, CMHA administers two primary programs: the Housing Choice Voucher program, which serves approximately 11,600 families, and the Asset Management or Public Housing program, which serves more than 5,300 families.

Currently, CMHA is working to transition its 5,300-unit public housing portfolio to the Rental Assistance Demonstration (RAD). This process represents an investment worth hundreds of millions of dollars in the future of Cincinnati communities.

Construction is ongoing at several CMHA developments throughout the city and county while transformational plans for additional communities are being devised. The agency is also working toward beginning construction on Bennett Point — its first new construction multifamily development within city limits in over a decade.

CMHA's efforts will spur inclusive economic development and help ensure Hamilton County is well positioned to thrive in the decades to come.



CMHA'S ECONOMIC IMPACT

CMHA's ongoing refinancing and rehabilitation of its public housing portfolio represents an enormous investment in Cincinnati and Hamilton County.

Between its self-developed sites, a handful of sites slated to be redeveloped in conjunction with private sector co-developers and the refinancing of its West End City West community, the agency expects to generate approximately \$1 billion in development spending in the next decade.

These dollars will be allocated in accordance with CMHA's award-winning economic inclusion programs.

ECONOMIC INCLUSION

CMHA has established aggressive goals for ensuring the dollars generated by redevelopment of CMHA properties result in shared benefits across the region. These goals include:

- Twenty percent of all new construction contracts go to Section 3 businesses (HUD's goal is 10%).
- Thirty percent of all new hires that are a result of an awarded contract are Section 3 individuals.
- Twenty percent of contracts go to Minority-Owned Businesses.
- Five percent of contracts go to Women-Owned Businesses.



WEST UNION SQUARE

Location:	<i>Colerain Township</i>
Units:	<i>70</i>
Scope:	<i>New construction</i>
Construction costs:	<i>\$13,993,423</i>
Projected completion:	<i>2018</i>



Completed in 2018, The Cincinnati Metropolitan Housing Authority's 70-unit West Union Square provides amenity-rich housing for Hamilton County seniors.

The property was financed primarily with tax credits and provides 58 one-bedroom units, 12 two-bedroom units, a community room, theater, fitness area and ample outdoor gathering space.

Its rear courtyard and spacious lobby will recall a traditional American Main Street, making the building a natural gathering point for residents, their families and friends.



West Union Square also anchors the ongoing revitalization of Colerain Township's Jonrose Avenue. The property will replace a series of blighted multifamily developments that for years were marked by high vacancy rates, substandard living conditions and rampant crime.

West Union Square's revitalizing effects are already paying dividends, with community leaders having canceled plans to close a nearby school. CMHA is proud to have worked with local school and county officials to reroute through traffic and cultivate a more human-scaled neighborhood to meet the needs of all generations.



CARY CROSSING

Location:	<i>Mt. Healthy</i>
Units:	<i>36</i>
Scope:	<i>New construction</i>
Construction costs:	<i>\$3,653,317</i>
Projected completion:	<i>2017</i>



Individuals and families with disabilities in Hamilton County call Cary Crossing home.

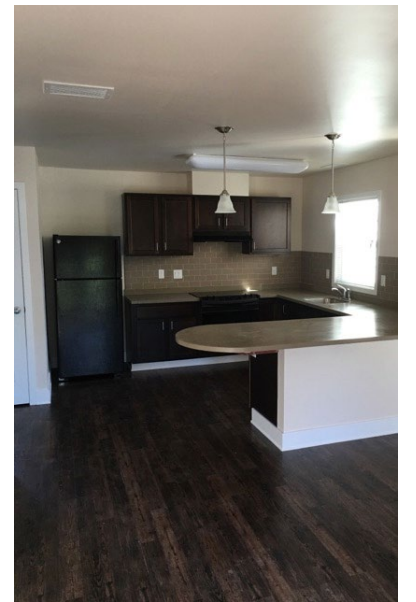
The Cincinnati Metropolitan Housing Authority completed the Mt. Healthy property in 2017 with 36 units of affordable one- and two-bedroom units, a community room and plenty of outdoor space.



All units meet the Uniform Federal Accessibility Standards for mobility, sight and sound accessibility. They feature private kitchens, bathrooms, bedrooms, storage, laundry hookups and patios.

The development addresses a previously unmet need for housing that is accessible to those with disabilities.

Cary Crossing provides easy access to medical institutions that provide low-cost medical and dental services to local residents. Future development will include a social enterprise to provide training and employment opportunities to the development's residents and their peers. The development site was selected for its proximity to public transportation and community services as well as its small town feel.



SUTTER VIEW

Neighborhood:	<i>English Woods</i>
Units:	<i>114</i>
Scope:	<i>Substantial Rehab</i>
Construction costs:	<i>\$15,774,091</i>
Projected completion:	<i>December 2020</i>

Sutter View is an apartment community just west of the Mill Creek Valley. Its northern and southern boundaries are major transportation corridors for commuters heading to Uptown (home to major higher education and medical institutions) and points north and south, including the Central Business District via Interstate 75.

CMHA is converting 114 public housing units to RAD and financing significant rehabilitation with 4% Low Income Housing Tax Credits and Tax Exempt Bonds, among other sources. Each apartment is being comprehensively rehabilitated, and all lead and asbestos will be removed. The apartments will be reconfigured so that they better respond to the community's needs. Kitchens, baths, flooring and mechanicals will be replaced. The rehabilitation also includes site work and parking lot repaving.



Before



After

PINECREST

Neighborhood:	<i>Price Hill</i>
Units:	<i>190</i>
Scope:	<i>Substantial Rehab</i>
Construction costs:	<i>\$15,609,088</i>
Projected completion:	<i>November 2021</i>



The revitalization of Pinecrest includes the substantial rehabilitation of a public housing multifamily elevator building located at 3951 W Eighth Street in the Price Hill neighborhood of Cincinnati.

Pinecrest was constructed in 1972 and consists of 190 multifamily apartments in a 9-story building. HUD's public housing Date of Full Availability (DOFA) was 03/01/1972. On June 29, 2020, Pinecrest converted from 190 units of public housing subsidy to 190 RAD PBRA/LIHTC apartments; the rehab is being financed by Tax-Exempt Bonds, Tax Credit Equity, a 40-year FHA insured mortgage through HUD's 221 d4 program, Ohio Housing Finance Agency (OHFA) Bond Gap Financing/ National Housing Trust Funds, a Tax-Exempt Sponsor Loan and a Taxable Sponsor Loan, CMHA Replacement Housing Factor (RHF) funds, and an Equity Bridge Loan.

All 190 apartments will be restricted to tax credit eligible households, at 60% area median income (AMI) or below, during the compliance period and extended use period, as applicable and defined in Section 42 of the Internal Revenue Code.

In addition, on October 22, 2019, CMHA was awarded an allocation of National Housing Trust Funds (NHTF) from OHFA through their Bond Gap Financing/Housing Assistance Development Program application. NHTF are HUD funds allocated to states to serve extremely low-income households, at 30% AMI or below. Ten percent of the apartments at Pinecrest are set aside for households below 30% AMI for a minimum period of 30-years, governed by a funding agreement between OHFA and Pinecrest RAD, LLC.



THE RESERVE ON SOUTH MARTIN

Location:	<i>Mt. Healthy</i>
Units:	<i>60</i>
Scope:	<i>New construction</i>
Construction costs:	<i>\$8,299,129</i>
Projected completion:	<i>2013</i>

The Reserve on South Martin is located in Mt. Healthy, Ohio.

It features 48 one-bedroom and 12 two-bedroom units for seniors. It is managed by the Cincinnati Metropolitan Housing Authority's wholly owned subsidiary, Touchstone Property Services.

The Reserve's 60 units represent the CMHA's Gold Standard for Affordable Housing.

Each unit features a large bathroom, a front-loading washer and dryer, spacious closets, a private patio or balcony and walk-in showers. Residents enjoy The Reserve's gardening area, walking trails, inviting lobby, fitness center, library, computer stations, picnic areas, day lounges and community room with modern amenities.

In addition to its quality of life features, The Reserve demonstrates CMHA's commitment to energy efficiency. The building is certified LEED Platinum and was named Cincinnati's Greenest Building in 2014 by the Cincinnati Business Courier.



THE EVANSTON

Neighborhood:	<i>Evanston</i>
Units:	<i>100</i>
Scope:	<i>Moderate Rehab</i>
Construction costs:	<i>\$1,660,261</i>
Projected completion:	<i>January 2021</i>

The Evanston is a 100-unit four-story property located at 1820 Rutland Avenue in its namesake neighborhood of Evanston.

Originally constructed in 1986, the building historically served as public housing for Cincinnati seniors. In recent years, however, it transitioned into a general occupancy residence. While their floorplans vary slightly, all 100 apartments are one-bedroom, one-bathroom units.

The Evanston was converted to the Rental Assistance Demonstration (RAD) on November 22, 2019. Its Housing Assistance Payment (HAP) with the Department of Housing & Urban Development (HUD) became effective December 1, 2019. All 100 units are subsidized with RAD Project Based Rental Assistance (PBRA).

CMHA leveraged this transition to RAD to facilitate a \$1.6 million rehabilitation of the property, which will be completed in early 2021. This work was financed with a FHA 223(f) mortgage, which was provided by ORIX Real Estate Capital (formerly RED Mortgage Capital).



PARK EDEN

Neighborhood:	<i>Walnut Hills</i>
Units:	<i>176</i>
Scope:	<i>Substantial Rehab</i>
Construction costs:	<i>\$14,934,002</i>
Projected completion:	<i>April 2022</i>



Park Eden is a 9-story, 176-unit property in Cincinnati's Walnut Hills neighborhood. Since its construction in 1973, it has served as public housing administered by the Cincinnati Metropolitan Housing Authority (CMHA) and supported financially by the U.S. Department of Housing and Urban Development (HUD).

Midway through 2020, CMHA began performing gut rehabs of all 176 apartments at Park Eden. Apartments will be reconfigured to provide an airier feel. All residents will receive new bathrooms, new paint, new flooring and a variety of other upgrades. Common spaces will also be improved in order to improve the property's social environment and foster more positive connections among residents.

This transformational rehab will be made possible by the conversion of all 176 units to the Rental Assistance Demonstration and a corresponding PBRA subsidy. CMHA financed this rehab with a combination of sources that will include non-competitive housing tax credits, CMHA capital, reinvested developer fee, deferred developer fee, an FHA 221(d)(4) mortgage and seller take-back financing.

All existing residents will have the right to return, in accordance with HUD's RAD guidelines. The property will be subject to a land use restriction whereby all tenants must meet the HUD RAD income eligibility requirements and will also be subject to the tax credit maximum rents established by the Ohio Housing Finance Agency.



MARIANNA TERRACE

Location:	<i>Lincoln Heights</i>
Units:	<i>76</i>
Scope:	<i>Substantial Rehab</i>
Construction costs:	<i>\$5,897,091</i>
Projected start:	<i>July 2021</i>

Marianna Terrace is 76-unit townhouse-style development located in north suburban Lincoln Heights. The property features one- to five-bedroom apartments and — as a result of its ample green space, quality local district and playground facilities — is well regarded among CMHA families with children.

CMHA plans to convert Marianna Terrace to the Rental Assistance Demonstration midway through 2021, and, in doing so, facilitate a transformative physical rehabilitation of the property.

This rehab will affect ten two-story buildings and six one-story buildings, all of which were originally constructed in 1960. This project will bring the site into compliance with the Enterprise Green Communities criteria and ensure five percent of apartments are equipped for occupancy by mobility-impaired residents while an additional two percent are equipped for sensory-impaired residents.

The construction scope of work will include extensive unit interior and exterior upgrades aimed at modernizing the appearance of the aging structures while also affirmatively addressing some of the mechanical, electrical and plumbing issues identified as needing repairs by residents and engineers.

CMHA hopes to begin construction at Marianna Terrace midway through 2021.



Current



Planned

BENNETT POINT

Bennett Point is a planned 56-unit mixed-income development in the Cincinnati neighborhood of Pendleton — one of the city’s most centrally located and economically dynamic areas.

The two buildings that comprise the development will offer a variety of one-, two- and three-bedroom units, 88 percent of which will be offered at rents attainable to those earning 60 percent of Area Median Income. The remaining units will be market rate. This mixture of bedroom types and price points will ensure the development fosters a diverse and inclusive community while also allowing low-income Cincinnatians to take part in the ongoing economic revitalization of Pendleton and the adjacent neighborhood of Over-the-Rhine.

The Cincinnati Metropolitan Housing Authority (CMHA) intends to leverage Low-Income Housing Tax Credits, City of Cincinnati HOME Funds, and Property Assessed Clean Energy financing through the Greater Cincinnati Energy Alliance to bring this project to fruition.

The agency was recently awarded a nearly \$8 million allocation of Low-Income Housing Tax Credits from the Ohio Housing Finance Agency aimed at making Bennett Point a reality.

Neighborhood:	<i>Pendleton</i>
Units:	<i>56</i>
Scope:	<i>New construction</i>
Construction costs:	<i>\$12,630,839 (estimated)</i>
Projected completion:	<i>TBD</i>



UPCOMING DEVELOPMENTS

Riverview / San Marco

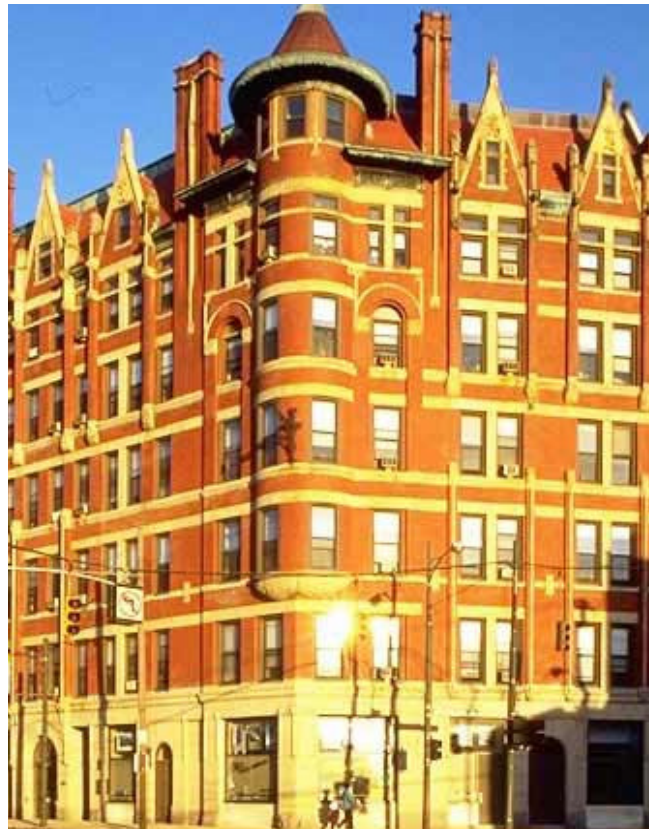
Neighborhood: *East Walnut Hills*
Units: *131*
Scope: *Substantial rehabilitation*
Construction costs: *\$11,790,000 (estimated)*
Projected completion: *To be determined*

Marquette Manor

Neighborhood: *English Woods*
Units: *140*
Scope: *Substantial rehabilitation*
Construction costs: *\$12,600,000 (estimated)*
Projected completion: *To be determined*

The Redding

Neighborhood: *Avondale*
Units: *92*
Scope: *Substantial rehabilitation*
Construction costs: *\$6,900,000 (estimated)*
Projected completion: *To be determined*





Cincinnati Metropolitan Housing Authority Development Team

Gary T. Boeres, Development Director – Gary leads the CMHA Development Department and its efforts to convert the agency’s approximately 5,300-unit public housing portfolio to the Rental Assistance Demonstration. He reports directly to the Chief Operating Officer and Chief Executive Officer and leads a diverse team of financial analysts and project managers charged with planning and executing complex affordable housing development efforts. Under Gary’s leadership, CMHA has successfully converted 580 units to RAD and submitted a successful application for competitive Low-Income Housing Tax Credits.

Joe Norton, Director of Real Estate & Construction – Joe oversees CMHA department charged with modernizing aging properties and planning/executing construction projects worth tens of millions of dollars. In the last two years alone, Joe’s department has managed RAD conversion projects worth approximately \$50 million in hard construction costs. He maintains an extensive knowledge of CMHA properties, having joined the agency in the late 1990s. Joe also reports directly to the Chief Operating Officer and Chief Executive Officer.

Michael R. Koch, Design Manager – Mike is responsible for ensuring all CMHA development projects are planned in accordance with applicable design guidelines dictated by funders. He works with architects to steer the process of developing plans and specifications that meet the needs of residents while also respecting difficult financial constraints. His deeprooted knowledge of CMHA properties ensures rehab plans are fully vetted and contextually appropriate.

Deborah L. Sparks, Development Financial Manager – A CPA with extensive experience in several industries, Debby is CMHA’s lead underwriter on all development transactions. She supervises the agency’s development financial analysts and maintains an up-to-date understanding of all applicable rules and regulations related to affordable housing development. In addition to planning development transactions, she plays an active role in ensuring properties remain in compliance post-rehab.

Vandana Multani, Financial Analyst – The newest member of CMHA’s Development team, Vandana brings extensive financial analysis skills to CMHA’s work. Having worked in a variety of private sector organizations in the United States, the UK and India, she is highly adept at creating and analyzing complex financial models and budgets. Her role at CMHA includes working with the rest of the Development team to ensure all affordable housing transactions undertaken by the agency are done so carefully and with a nuanced understanding of the relevant financial parameters.

Alexandria Barnes, Senior Housing Development Analyst – In addition to managing RAD conversion projects, Alex leads CMHA’s efforts related to competitive housing tax credit applications. She was the driving force behind the successful 2019 application for HTCs at Bennett Point. Her background in development finance, contract negotiations and geospatial data analysis allow the CMHA development department to assemble strong teams of partners and contractors while pursuing quality projects.

Paolo Cisneros, Senior Housing Development Analyst – Paolo joined CMHA in 2018 and is primarily responsible for managing RAD conversion projects. He has so far closed two transactions worth roughly \$38 million and which preserve 276 units of previously threatened affordable housing. He is currently leading the effort to secure Federal Rehab Tax Credits on a pair of historic CMHA properties – a first for the agency.

Shonda McMillian, Development Project Manager – Shonda recently managed the RAD conversion of The Pinecrest, a 190-unit building in Cincinnati’s Price Hill neighborhood. This project presented many unforeseen challenges, all of which were successfully navigated thanks to Shonda’s leadership. She plays an integral role in planning and executing RAD conversion projects.

Karin Gandler, Housing Development Analyst – Karin joins CMHA having recently completed her graduate studies at Carnegie Mellon University. She comes to agency after having earned experience with a planning and development corporation in addition to a county-level development authority.

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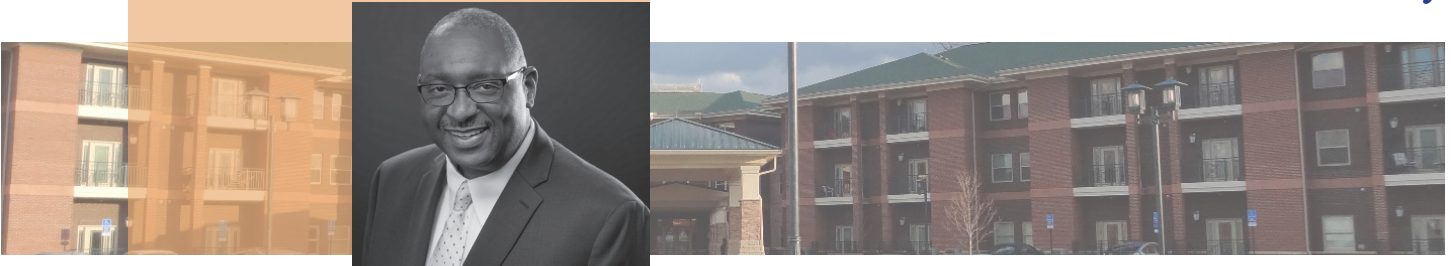
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Gregory D. Johnson

Chief Executive Officer

Cincinnati Metropolitan Housing Authority



Gregory D. Johnson, MS, PHM, EDEP is the Chief Executive Officer (CEO) for the Cincinnati Metropolitan Housing Authority. Selected by the CMHA Board of Commissioners for his leadership and strategic skills, Mr. Johnson will continue to build upon the agency's legacy of providing quality affordable housing.

Seeking creative solutions within the housing industry is a lifelong mission for Mr. Johnson. It was his deep, personal understanding of the struggles these everyday people face that led him to a career in which he could empower individuals, foster a sense of community and provide access to the same positive opportunities that impacted his life.

Mr. Johnson's unwavering commitment to the community is one of the reasons he has been so often recognized by his peers and associates. He has received several community and industry recognition awards from the National Association of Housing and Redevelopment Officials (NAHRO), the Greater Dayton African American Chamber of Commerce and the Dayton Chamber of Commerce.

Mr. Johnson is also recognized as a leader within the housing industry. In addition to earning a B.A. from Tiffin University and a Master's Degree from Quinnipiac University, he also holds several industry certifications, including:

- Executive Leadership – Harvard Kennedy School in Boston
- Leading Organizational Change – Wharton in Philadelphia
- Graduate of the Executive Directors Program – Rutgers University
- Executive Management completion – NAHRO
- Public Housing Management – Nan McKay and Associates
- Six Sigma Green Belt in problem solving – Villanova University

Mr. Johnson has also been called upon as an industry expert. In 2006, he wrote and presented a brief before the House Government Reform Subcommittee on Federalism and the Census ("Public Housing Management: Do the Public Housing Authorities have the flexibility they need to meet the changing demands of the 21st Century?"). He has also given numerous presentations to industry groups such as the National Association of Housing Redevelopment Officials (NAHRO), and the Ohio Housing Authorities Conference (OHAC).

Additionally, Mr. Johnson has been appointed to the city of Cincinnati Economic Development & Job Task Force, the Ohio Means Jobs Board, the Child Poverty committee and the local CPPC advisory board, the newly created Economic Inclusion – Diversity Advisory Board at the City of Cincinnati and he is on the Zoning Appeals Board for the City of Springdale. He is a past board member of Lighthouse Youth Services.

Reema Ruberg
Chief Financial Officer &
Director of Administration

Cincinnati
Metropolitan
Housing
Authority



PROFESSIONAL SUMMARY

Professional and self-motivated Chief Financial Officer/Director Administration with 20 years of financial and management experience. Highly proficient in accounting and financial management and internal controls, operational analysis, budgeting & forecasting, costing & inventory control, benefits management & personnel, and information systems. Excellent interpersonal skills with all levels, and proven problem solver with demonstrated ability to evaluate and complete challenging projects successfully.

ACCOMPLISHMENTS

- Researched, implemented, and managed a totally integrated accounting & manufacturing (ERP) information system at multiple companies successfully.
- Established costing and financial reporting procedures and methods for a new division and developed costing method for a new process line.
- Developed and initiated policies and procedures for financial transactions and internal controls.
- Successfully established Accounting department of newly acquired wholly owned subsidiary.
- Successfully budgeted, researched and negotiated large contracts with multiple vendors.

PROFESSIONAL HISTORY

Chief Financial Officer & Director of Administration, Cincinnati Metropolitan Housing Authority, 2002 - Present

Direct the departments of Finance/Accounting, Information Technology, Procurement, Inventory Warehouse, Copy Shop, Human Resources, Legal and Development. Essential functions of the position are to manage and oversee financial operations of \$100 million plus budget with various sources of revenue and funding, monitor multiple million dollar construction contracts and modernization efforts for the largest property owners in the City of Cincinnati. Manage, develop and improve technological advancement of organization's communication and information systems. Manage various other departments for continual improvements. Primary fiscal officer for organization's relationships with various financial institutions, government agencies, and audit firms including Auditor of State of Ohio. Created separate internal controls department for improved fiscal and program auditing and compliance. Responsible for strategic planning and development for the agency's housing portfolio.

Director of Finance, Talbert House, THREC, TH Foundation, & Core Behavioral Health Ctrs., 2000-2002

Managed the Finance/Accounting department for Talbert House and Affiliates and was responsible for the development and implementation of agency wide fiscal policy and procedures and the fiscal management of the numerous public and private contracts held by Talbert House and Affiliates. Automated systems to replace manual procedures to improve efficiency and accuracy of fiscal reporting. Had multiple fiscal reporting responsibilities to Executive Directors, Vice Presidents, and multiple agencies' Board Finance Committees members as well as various public funded local and state boards and agencies.

Chief Financial Officer, Workstream Inc., 1998-2000

Managed the operations in connection with Finance/Accounting, and Information Systems for multi-divisional manufacturing company with sites located in Cincinnati and Los Angeles. Responsibilities included supervision of financial functions and information technology, financial analysis, forecasting, management of department managers and staff, and developed corporate policies and procedures for accounting internal controls. Lead the development and implementation of ERP software. Coordinated all internal and external resources to implement software system & ongoing management of year 2 & 3 issues. Developed & trained on operational procedures for manufacturing and accounting systems.

Chief Financial Officer, EPCOR Foundries & AMR, Division of Seilkop Industries, 1991 -1998

Management of financial and accounting functions, human resources and benefits, and information technology. Responsible for consolidation of all divisional financials and corporate taxes. Promoted from Controller, where duties included responsibilities for all accounting functions, forecasting, budgeting, cash management, operations analysis, inventory analysis, costing, information system administration and training. Additional responsibilities for maintaining and updating product standard costing and inventory evaluation.

Accounting Manager, Ruberg Construction Corporation, 1990-1991

Managed all aspects of the accounting function, budgeting, cash management, project costing and analysis, setup in house payroll system, and was responsible for all corporate taxes.

Auditor-Central Audit Staff, State of Ohio, 1988-1990

Performed complex sales and use tax audits on Fortune 500 companies. Conducted detailed analysis of records such as tax returns, journals and general ledges, and source documents. Utilized statistical analysis to set up and review direct payment procedures. Prepared and reviewed concise reports of audit findings with corporate representatives and attorneys. Previously served as Auditor of the Cincinnati District, conducting sales and use tax audits on small to medium size companies, contractors and utilities to determine compliance with the tax laws and regulations. Acquired skills in audit procedure and techniques, and tax law and regulations.

EDUCATION

Wright State University

MBA, Dual Concentration in Finance and Management

B.S., Biology/Business

BUSINESS SOFTWARE KNOWLEDGE

Microsoft Office (Excel, Word, Access), Progress, and various accounting/manufacturing/non-profit/ industry specific software packages such as Symix, Great Plains, Mas90, Unicare, and Emphasys (Lib/ Select, Elite).

REFERENCES

Available upon mutual interest and request

Joe Norton

Director of Real Estate & Construction

Cincinnati
Metropolitan
Housing
Authority



PROFESSIONAL SUMMARY

Director of Real Estate and Construction with over 21 years of experience. Responsible for Real Estate, Construction and Design activities throughout Hamilton County of CMHA portfolio. Over the past 21 years' instrumental in redevelopment/preservation of the 17 Largest Housing Authorities Housing stock. In the last 8 years has developed new developments which include the utilization of Low-Income Housing Tax Credits (LIHTC, 9% and 4%) Homes Funds, CDBG funds, Neighborhood Stabilization Program (NSP) CMHA Capital and Replacement Housing Factor grants. Highly proficient, establishing internal controls, budgeting, personnel management. Excellent interpersonal skills with all levels, and proven problem solver with demonstrated ability to evaluate and complete challenging projects successfully.

ACCOMPLISHMENTS

- Routinely manage Capital and Replacement Housing Factor grants in excess of 32 mil
- Direct Construction projects from \$50,000 - \$27,000,000
- Manages schedules, timelines and budgets.
- Directed Construction Projects using LIHTC (LIHTC (9% and 4%) and other funding.
- Assists with RFP and RFQ process for third party contracts with designers, developers, appraisers, surveyors, etc.
- Establishes and maintains public/private partnerships with federal, state and local government, and non-profit and for-profit corporations.
- Responsible for all procurement activities related to Rehabilitation and Construction Projects
- Prepares and manages project budgets and schedules throughout development process.
- Revise Project Work Plan as necessary to meet changing needs and requirements. Proactively identify changes in work scope and ensure appropriate planning measures are taken with internal/external clients and HUD to reassess, renegotiate and amend scope of work responsibilities, proposals, contract and budget.
- Prepared and presents presentations regarding development projects and program geared for a wide-range of audiences.
- Attends community meetings held by public entities, neighborhood groups, and/or non-profits support the development goals of the organization.
- Planned and managed complex real estate transactions from inception through lease-up for acquisition, rehabilitation and construction of assets.
- Established financial reporting of development and construction projects.
- Developed and initiated policies and procedures for development activities and internal controls.
- Directs Section 3 participation.

PROFESSIONAL HISTORY

Director of Real Estate and Construction, Cincinnati Metropolitan Housing Authority, 1997 – Present

Director manages directly or indirectly administrative, planning, design, construction management, and development staff and works closely and cooperatively with a CMHA team to insure a comprehensive approach to planning and portfolio re-engineering strategies which include demolition and disposition of current assets as well as general real estate planning and acquisition activities. The strategies entail efforts to reconfigure CMHA's housing stock across all programs to maintain high quality and sustainable portfolio, and to ensure CMHA's role as a leader in providing quality affordable housing solutions to individuals of low to moderate income is maintained. The duties of this position encompass those of planner and real estate developer. The roles will assist the Authority in coordination of portfolio redevelopment strategies to stay updated to reflect changing market & neighborhood conditions, desired property amenities and funding resources.

Gary T. Boeres

Director of Housing Development

Cincinnati
Metropolitan
Housing
Authority



Director of Housing Development, Cincinnati Metropolitan Housing Authority, Nov. 2018 - Present

Oversees and implements the development and preservation of affordable housing within Hamilton County, Ohio. The Development Director is responsible for a pipeline of transactions for the growth of affordable housing for the agency, residents and local communities. This position is broadly defined to accommodate every phase of affordable housing development from concept to completion.

- Seeks and evaluates opportunities in residential, retail/commercial and community development. Conduct feasibility analysis; create a development strategy; select sites and negotiate purchase agreements; coordinate community outreach.
- Oversees development projects from concept to conclusion.
- Establishes internal and external partnerships, ensure conformance to federal, state, local policies and laws. Provide leadership and direction in establishing development goals, objectives and policies. Investigates and resolve problems involved in the development of affordable housing and mixed use projects.
- Prepare development and operational pro-formas and analyze financial models to ensure underwriting is sound to ensure project or program will succeed. Secures multi-layered project financing. Prepare and submits applications to secure financing, create deal structures, and negotiates financing terms.
- Manages the development team, including selecting and hiring of development associates, analysts and consultants necessary to develop the project; coordinates and monitors the work of the professional consultants; ensures work is completed within required terms and obtain internal approvals; manages contracts and billing process.
- Monitor construction process to ensure timely completion of the projects. Works with construction staff to review construction and development budgets.
- Monitors draws, costs and overall development and construction budgets. Manages transition of project from initial concept to financing into construction to closing and conversion to lease up and operations.
- Advocates for affordable housing by giving public presentations, participating in community and public policy groups; attending conferences, and staying informed of public policies affecting affordable housing.
- Coordinates proposals to third party funding sources in response to RFP's, RAD (Rental Assistance Demonstration), HOME, CBDG, Low Income Housing Tax Credit applications, private financing and other financing opportunities.
- Ensures compliance with funding requirements, maintains records for all affordable housing properties for which CMHA actively manages and owns.

QUALIFICATIONS

Extensive knowledge of public and private financing, including tax credit program. Experience with tax-exempt bond financing, the Federal Low Income Housing Tax Credit (LIHTC) program, FHA mortgage insurance programs, PHA and HUD funding preferred.

Knowledge of federal, state and local laws, rules and regulations pertaining to contract administration, bid documents and related matters.

A successful track record of property acquisition negotiations, public financing and ability to close multi-layered real estate financing transaction.

Demonstrates experience overseeing the real estate development process, from start to finish including design, acquisition, financing, construction and property stabilization.

PROFESSIONAL HISTORY

Supervising Community Development Analyst, City of Cincinnati

Provides expertise in underwriting and developing projects for market rate and affordable residential projects within the City limits. Responsible oversight of HOME, CDBG and Capital funds for the Housing Division.

Hamilton Township Administrator, Hamilton Township, Warren County, Ohio

Responsible for the day-to-day operations of the Township, including the supervision of five departments and oversight of an \$8M operating budget.

Assistant Township Administrator, Hamilton Township, Warren County, Ohio

Responsible for the day-to-day operations of the Township, including the supervision of five departments and oversight of capital improvements.

Community Development Director, Hamilton Township, Warren County, Ohio

Director of development, planning, and zoning for one of the fastest growing communities in the state at the time. Provided Staff support to the Trustees, Zoning Commission and BZA.

EDUCATION

University of Cincinnati

Master of Community Planning

B.A. Political Science, Emphasis in Public Administration

Michael R. Koch, PE

Manager of Design Services

Cincinnati
Metropolitan
Housing
Authority



PROFESSIONAL HISTORY

Manager of Design Services, Cincinnati Metropolitan Housing Authority, Nov. 2001 - Present

Oversee energy management, design department and assist in overseeing construction rehabilitation work for the Housing Authority. Managed staff of designers and architects, as well outside consultants. Tasks include:

- Managed multiple projects simultaneously from concept through the bid phase utilizing in house and consulting personnel. Projects had construction budgets of up to \$32 million and were funded through capital funds grants and mixed financing, including LIHTC and FHA.
- Monitor construction of LIHTC and Capital Fund projects ensuring compliance with contract documents, addressing RFI's and change orders, reviewing pay applications and completion of required documentation.
- Analyze the development needs of the Housing Authority. This includes physical needs assessments (PNA, GPNA and RPCA) and environmental testing (lead, asbestos, mold, radon and site assessments).
- Completion of annual and 5 year plans. Reviewed projects for suitability with 9% and 4% LIHTC programs including completion of AHFA's.
- Establish, plan and schedule the design activities based on funding and budgets provided;
- Review and edit all architectural and engineering plans and specifications developed by the Housing Authority or from outside A&E firms. Insure high standards of performance on all design and development work, environmental reviews and testing, surveying, engineering and energy program compliance.
- Monitored design and construction activities for compliance with LEED, Enterprise Green Communities and National Green Building Standards criteria.
- Monitor agency wide energy usage. Identify and perform cost analysis of energy savings opportunities.
- Communicated directly with the Maintenance Department and other associated departments, consultants, public agencies, building departments, and residents to clarify needs, coordinate the activities of the Housing Authority, and assure compliance with federal, state, and local regulation.
- Evaluate the performance of design staff. Establish objective criteria to measure performance. Ensure fair and consistent treatment of staff and applicable union agreements.

Project Delivery Leader, Belcan – EDEC Division, May 1996 – Sept. 2001

Responsible for definition, design, component selection/sizing, installation and start-up assistance on engineering projects for P&G relating to utility systems, including:

- Designed large HVAC systems for industrial facilities housing multiple diaper and paper product production lines. Tight humidity control was required to maintain product quality. Responsibilities included calculations, equipment selection/specification, layout and start-up support.
- Designed dust control systems for toilet paper, paper towel and diaper production lines. Responsibilities included calculations, equipment selection/specification, layout and start-up support.
- Lead Engineer and designer for execution / installation of an absorption chiller with associated pumps, tanks, piping, blow down, make-up and controls. Excess steam capacity was converted to chilled water for HVAC systems and cooling of production equipment.
- Engineering and design of chilled water, compressed air and steam system to support HVAC and dust control systems. Performed pipe stress analysis on steam systems.
- Developed Process and Instrumentation Diagrams for HVAC, Dust Control and piping systems.
- Project Engineer responsible for the development of definition, design estimates, schedules and forecasts. Performed cost tracking on assigned

- projects. Monitored consistency and quality from each discipline: structural, electrical, mechanical, safety and environmental
- Engineering and design of process piping (glue, mineral oil, wax and ink) systems.

Environmental/Safety Manager, *Aurora Casket Company*, March 1994 – March 1996

Responsible for the development and implementation of policies concerning environmental management and pollution abatement; process personnel safety in a union, multi-plant environment, including:

- Maintenance and improvement of compliance with federal, state and local regulatory laws, including CAA, SARA, CWA, RCRA, DOT, OSHA and UST Management.
- Advised operating managers and supervisors concerning the company's environmental objectives; assisted in determining and implementing corrective action.
- Devised, coordinated and performed training programs and campaigns to increase proficiency in safe practices and promote safety consciousness
- Liaison with outside associations, corporate management personnel and government personnel in regulatory agencies.
- Establishment and continuing success of the internal safety committee.
- Performed engineering projects involving time studies, air balance studies and reviews of material handling practices.
- Investigation of industrial accidents.
- Assisted in the administration of Worker's Compensation.

Project Engineer, *Qsource Engineering, Inc.*, May 1990 – Feb. 1994

Managed projects for a wide range of clients; assisted with their environmental / safety concerns, including:

- Designed and tested ventilation/air pollution control systems. Control equipment included baghouses, scrubbers, cyclones, incinerators and paint booths.
- Performance of Best Available Technology Reviews.
- Performed Phase I Environmental Site Assessments.
- Designed process and utility piping systems.
- Air dispersion modeling.
- Oversight of emission testing of point sources per USEPA Reference Methods.
- Performed environmental and safety audits.
- Prepared SARA reports and support documentation.
- Completed air, wastewater and storm water permit applications.
- Developed and performed training on OSHA programs.
- Designed secondary containment systems.

EDUCATION

University of Cincinnati

MS, Occupational Safety and Health

University of Dayton

BS, Mechanical Engineering Technology

State of Ohio

Professional Engineer (PE)

Deborah L. Sparks

Development Finance Manager

Cincinnati
Metropolitan
Housing
Authority



CAREER SUMMARY

Experienced Accounting Professional and Financial Analyst with strong skill levels in financial reporting, budget planning and forecasting, as well as strategic analysis with a focus on process improvement, working well in a multi-task environment, both as an individual and team contributor.

CERTIFICATION & COMPUTER SKILLS

- Certified Public Accountant—fully licensed in Ohio
- Rental Housing Development Finance Professional (RHDFP) Certification from National Development Council (NDC)
- Experienced in Emphasis/Elite, SAP/Oracle, Quickbooks
- Microsoft Office: Word, Excel, PowerPoint, Outlook

PROFESSIONAL HISTORY

Development Finance Manager, *Cincinnati Metropolitan Housing Authority*, June 2020 - Present

- Provide guidance and supervision of the Financial Analyst employee/s during development of construction budgets and funding structures, ensuring underwriting and loan closeout processes are met
- Provide guidance and supervision of the Financial Analyst employee/s for financial reporting and funding draw processes of projects in Construction/Development phase, many of which will simultaneously be in Operations phase
- Collaborate with CMHA Property Management, Procurement, Legal, Finance & Accounting, Real Estate Construction, Compliance and Relocation departments to coordinate costs, Operating budgets, compliance/reporting, and timing of funding delivery for each project
- Establish and maintain relationships in order to communicate and interact with outside parties, including but not limited to lenders, lawyers, professional tax preparers and independent auditors
- Understand and collaborate with executive management to structure and negotiate agreeable terms with partners, investors and lenders
- Participate as member of management team to make financial decisions regarding financing of development projects and other debt

Senior Housing Development Analyst, *Cincinnati Metropolitan Housing Authority*, Oct. 2018 – June 2020

- Plans and manages LIHTC real estate transactions from inception through cost certification and 8609 issuance for acquisition, rehabilitation and construction of assets
- Determines project feasibility; performs and/or oversees underwriting and analytical analysis of new/existing properties by creating financial models to ensure favorable terms and return on investment, researching data related to underwriting complex real estate and financing scenarios; securing capital needed to implement development plans, evaluate, structure, coordinate, negotiate and close financing for mixed income housing
- Continually analyzes Housing Authority's public housing portfolio for conversion to Rental Assistance Demonstration (RAD) by end of calendar year 2023 in order to balance funding for both public housing units and affordable housing units during multi-year process
- Prepares funding and disbursement applications and reviews funding applications prepared by other team members on the development team to ensure compliance with multiple lenders' requirements during development and construction process, including requirements of low-income housing tax credits, syndicator, HUD FHA, 4% Bond Funding, FHLB AHP, HOME/NSP, HUD Capital funding
- Manages the coordination and assembly of funding draw requests during development/construction, ensuring adherence to approved project development budget, obtaining funding approval of financial partners and overseeing facilitation of funds release to ensure timely payment of project costs.

Senior Accountant, Special Projects, *Cincinnati Metropolitan Housing Authority*, June 2016 – Oct. 2018

- Acts as liaison between Development and Finance departments to ensure GAAP recording of financial transactions at financial close of mixed-finance projects, as well as during development and conversion to occupancy
- Member of management team supporting Director of Finance in coordination of annual external audits and agreed upon procedures for public housing, as well as cost certifications and tax return compliance for mixed-finance entities and affordable housing
- Analyzes LIHTC and other affordable housing programs to determine new development project feasibility, preparing Sources & Uses and Operating Proformas for affordable housing finance applications (LIHTC 4% & 9%, FHLB AHP)
- Manages the coordination and assembly of funding draw requests during construction, ensuring adherence to approved project budget, obtaining funding approval of financial partners and overseeing facilitation of funds release to ensure timely payment of project costs
- Ensures compliance with LIHTC and other affordable housing program funding requirements for mixed-finance component units of CMHA through internal audit after conversion to occupancy
- Developed operating budget and proforma models for public housing portfolio of 5,000 units in order to allow management to assess viability for RAD conversion
- Worked with consultant to complete multi-phase RAD applications for 5,000 units
- Continues to work with Development team and Property Management team to build sustainable financial plans as CHAPs for RAD conversion are issued by HUD
- Manages operating subsidy distribution for public housing units included in mixed-finance entities and calculates RAD Initial Year Funding for projects

Owner & Executive Director, Huntington Learning Center, 2010 – 2015

- Responsible for all fiscal, marketing and operational functions with budget of \$575K
- Doubled student count and gross tuition receipts within one year of ownership
- Managed 3 full-time administrative and 25-35 part-time staff
- Worked cooperatively with other area franchises to develop/implement annual marketing budgets for television/radio/social media marketing of \$75K
- Analyzed testing results and presented to parents/student in order to implement an academic program to meet need of the student

Senior Accountant, University of Cincinnati, UCit, 2007 – 2009

- Prepared/monitored \$32M departmental budget (12 funds for 3 recharge centers with multiple cost centers), with 1, 3 and 5 year projections
- Led communication with department managers on centralized accounting processes, allowing them effective ownership and accountability for budget spending and 1-3-5 year financial plans/forecasts
- Prepared \$6M budget/spending analysis of outside department, including \$500K grant funding, and successfully proposed and implemented an equitable funding split between departments in order to enable consolidation of services
- Responsible for internal auditing of department, including monitoring departmental transactions for compliance with city, state, federal and university regulations, as well as assisting in development of fiscal policies and procedures for internal controls

Senior Accountant, University of Cincinnati, Univ Health Svcs, 2004 – 2007

- Facilitated department's transition from University's prior accounting system (CUFS) to new accounting system (SAP), including set up of new chart of accounts, cost centers and alignment of financial reporting (approximately 16 funds for 2 recharge service centers with 10 cost centers)
- Prepared and monitored \$15M departmental budget, with 3 and 5 year projections
- Reviewed each cost center's accounting processes for separation of duties and accurate reporting, including the health clinic's accounts receivable and payable systems
- Reviewed student insurance recordkeeping through UniverSis and BiWeb systems
- Forecasted costs and advised management regarding establishment of student health insurance premium, while serving on UC Student Health Insurance Board
- Reviewed student health insurance year end reconciliations and final payments

Auditor, Gear & Co., CPAs, 2001 – 2002

- Member of not-for-profit audit team
- Integral member of team to convert private school district electronic accounting system

Global Treasury Assistant, Procter & Gamble Co., 1997 – 2001

- Reviewed contracts and instructed banks on North American investment activities
- Resolved issues with banks when cash transactions did not execute properly
- Confirmed, instructed and booked foreign exchange currency transactions
- Streamlined multiple processes, maintaining separation of duties and adhering to internal control policies, while serving as Security Officer for intercompany banking system
- Prepared quarterly report analyzing performance vs. benchmark of funds and fund managers with regard to investments for defined contribution and defined benefit plans

- Forecasted and monitored actual FAS 87 and FAS 106 corporate expenses
- Facilitated delivery of dividends repatriated to parent company

EDUCATION

Northern Kentucky University

B.S.Accounting

University of Cincinnati

Associate Degree in Accounting Technology

VOLUNTEER ACTIVITIES

Accounting for Kids Day, 2006 – Present

- Volunteer at grade school activity day organized and sponsored by the OSCP

Mathis Foundation for Children, 2006 – 2012

- Mentor: 2006 – 2010 for “at risk” foster children in Southwest Ohio
- Board Member: 2008 – 2012; Finance Committee Member: 2008 – 2012
- Development Committee Chair: 2009 – 2010
- Actively involved in bringing financial reporting in-house through Quickbooks in order to meet governmental transparency requirements needed for grant funding
- Worked with committee to develop detailed budget allowing for functional income and expense reporting so outside auditor could review financial statements for grant funding
- Worked with committee to facilitate absorption of this foster care program by Lighthouse Youth Services in 2012

McAuley High School “McAuction”, 1996 – 2009

- Worked as Core Committee member of 6 person team to organize initial event then sustain momentum and growth for 12 years; duties included creating system of accountability for gifts and monies donated, as well as supervising organization of data regarding acquisitions for cataloging and acknowledgment
- Chairperson of fundraising event netting \$127,000 for 2 separate years (1999 and 2003), worked with vice chairs for smooth succession of duties including delegating workload, facilitating communication between volunteers, committee chairs and core committee

PROFESSIONAL ORGANIZATIONS

Ohio Society of Certified Public Accountants

Active member 2005 – present

American Institute of Certified Public Accountants

Active member 2005 – present

University of Cincinnati Assn. of Administrators, Managers & Professionals (UCCAMP)

Active member FY05 – FY09; elected Board Member for 3-yr term beginning July 2006

Interim Treasurer, April 2007 – June 2007; elected Treasurer for 2-yr term, FY08 & FY09

University of Cincinnati Women’s Leadership Conference

Chair of Steering Committee for conference held April 2009

Chair of Programming Committee for conferences held March 2008 & April 2009

Vice Chair of Programming Committee for conference held March 2007

Vandana Multani
Financial Analyst

Cincinnati
Metropolitan
Housing
Authority



PROFESSIONAL SUMMARY

Certified Public Accountant with a Master's Degree in Finance and diploma in International Financial Standards. Eleven years of experience in the following areas:

1. Financial Planning and Analysis

- Worked on establishing annual budgets and submissions of the same along with roadmaps showing action items required to adhere to the budgets set.
- Prepared quarterly and monthly forecasts of revenue, cost, GP, headcount, etc. and presenting them in monthly review calls along with YTY and QTQ analysis of the variances showing action plans to achieve targets.

2. Reconciliations, closing and reporting

- Worked on cash and other balance sheet recons for monthly and quarterly accounts.
- Worked on GL closure.

3. Knowledge of IFRS, SOX and US GAAP

- Worked as a SOX analyst and freelance IFRS trainer.

PROFESSIONAL HISTORY

Development Financial Analyst, Cincinnati Metropolitan Housing Authority, Oct. 2020 - Present

- Work with development analysts and project managers to create financial models.
- Work with development associates to resolve development and financial issues.
- Create financial models to evaluate potential new development opportunities and property exit strategies.
- Assist in due diligence of potential acquisitions and developments.
- Perform rental rate and utility allowance analysis to maximize revenue.
- Preparation of Construction Budgets.

Financial Analyst, ABB Inc., April 2018 - April 2020

- Reviewed revenue & cost, comparison with previous forecast / Budgets and variance analysis.
- Responsible for balance sheet reconciliation.
- Month end journal entries for accruals/true ups.
- Fixed asset capitalization & impairment review and recs.
- SOX documentation and audit requests.
- T&E and headcount report publication.
- Payroll rebill of Expats.
- Fx hedging.

Finance Manager, Tata Consultancy Services, Sept. 2013 - June 2017

- Consolidating the financials of the contract, review revenue & cost, comparison with previous forecast / Budgets and explaining the gaps, if any.
- Interaction with business leaders to prepare a forecast every month, highlight adverse impact on P&L. ensure that all the costs/revenues are recorded
- Work towards cost reduction / efficiency in cost-booking. Review Controllable vs Non-controllable (project-specific) costs. Work with Operations to check FTE deployment, opportunities to reduce internal FTEs on floor to bring down cost. Target issued to business to maintain lower FTE than requirement
- Analyze the outstanding receivables and follow-ups with client for payments in time.
- Support and manage the regional teams to control the DSO targets.
- Co-coordinating with Business support teams to see the movements in business to update the monthly and quarterly forecasts (of Headcount) with variance analysis to support the cost expenses booked.
- Involved in setting up of annual budgets and negotiating the same with higher levels of management based on the business drivers.
- Ad-hoc analysis as per requirements & providing a support for all the reviews with senior leadership.

Manager / FP&A Lead for Offshore Operations, WNS Global Services, March 2010 - Aug. 2013

- Successful transition of “Closing & Reporting” and “Financial analysis” processes from the US to India.
- Led a team of 2 members.
- Closing of General Ledger (GL) on monthly basis after ensuring that all the revenue and cost has been recorded. Generating Journals, accruals/ deferrals.
- Monthly balance sheet and P&L analysis, T&E and headcount report publication.
- Payroll rebill of Expats.
- Consolidating the actual numbers for a month-end/quarter-end and carrying out the variance analysis vis-à-vis forecast of revenue, cost and headcount.
- Supporting the month-end/quarter-close activities, analyzing P&L account before month close, identifying and rectifying issues.
- Was responsible for the preparation of SOP's and to obtain the client sign-off.
- Working with Statutory auditors and driving internal audits on regular basis.
- Cross training and mentoring all the new joinees.
- Worked on two lean projects resulting in 0.5 FTE saving and TAT reduction of 15 hrs per week respectively.
- Was a key member of the transition team and was awarded for the successful transition.
- Awarded with WNS - STAR PERFORMER for Q3'10 and Q3'11
- Recognized by management for designing and implementing a knowledge sharing forum for the operations floor.

Management Trainee, Genpact, April 2005 - Feb. 2010

1. GEWCS-Reconciliation Lead

- Led a team of 3 members.
- Was responsible for all daily, monthly and quarterly dashboards and process matrices.
- Monthly General Ledger (GL) closure.
- General Ledger review and analyzing the overhead. Perform full ledger reconciliation to check the validity of the costs hitting any cost center.
- Generating Journals, accruals/deferrals & amortization entries on monthly basis in coordination with the business.

2. SOX Testing - London, United Kingdom

- Plan, organize & execute SOX testing with all the supporting documents on monthly basis.
- Identifies deficiency in the present system and report it on a timely basis to take corrective action and perform remediation testing. Drive improvement in internal controls, strengthening policies & procedures of the organization.
- Identify the key financial reporting risk areas and create a test plan to ensure that the strategies are in place to ensure the effectiveness of internal controls to mitigate the identified risks. Documentation of the testing results and presentation of the test results to process owners. Design controls to mitigate the identified risks.

3. GE Leverage Finance - Monthly Account Reconciliations

- Monthly reconciliation of Cash and other balance sheet accounts and submission of the same to the business
- Has acquired and exhibited wing to wing process knowledge of Manual as well as Automated Cash matching and cash reconciliation.
- Responsible for clearing open items pertaining to the quarter for all balance sheet CDR to reduce potential unrec account to zero
- MJE preparation for Cash pool entries and bank charges

4. Achievements

- Rewarded by controllers for bringing 7 potential cash accounts to Zero in Q4'05.
- Rewarded by controllers in Q3'06 for showing dedication and commitment towards work.
- Worked with the GL Oracle Team for the successful implementation of TREMA tool (through which all the manual preparation of cash pools entries was eliminated)
- Worked along with the US IT and UK Controllership team for the implementation of Trecs (automated tool for cash matching, through which daily work got reduced from 3 hrs.)
- Awarded for Exemplary Performance & demonstration of Values at Workplace for year 2007 as a Sox analyst.
- Worked on many lean projects and was recognized for the same.

EDUCATION & CREDENTIALS

Accountancy Board of Ohio

Certified Public Accountant

ACCA, United Kingdom

Diploma in International Financial Reporting Standards (IFRS)

University of Rajasthan, India

Master's in Commerce

University of Rajasthan, India

Master's in Business Administration (Finance)

DOEACC, India

Post-Graduation Diploma in Computer Application ('A' Level)

Rajasthan University, India

Bachelor's in Commerce

SYSTEMS KNOWLEDGE

- Worked on Oracle 11i, SAP, SAP Business Intelligence applications and Hyperion.
- Proficient in Windows, MS Office tools and accounting packages.
- Experience with MS Excel, Word and PowerPoint.

Alexandria Barnes
Senior Housing Development Analyst

Cincinnati
Metropolitan
Housing
Authority



PROFESSIONAL HISTORY

Senior Housing Development Analyst, *Cincinnati Metropolitan Housing Authority*, April 2019 - Present

- Create and implement initiatives to increase leveraging/efficiency of resources to create an ongoing pipeline of development projects.
- Determine project feasibility; perform underwriting and analytical analysis of new/existing properties by creating financial models to ensure favorable terms and return on investment; research data related to underwriting complex real estate and financing scenarios; secure capital needed to implement development plans.
- Evaluate and negotiate loans and acquisition transactions.
- Manage schedules, timelines, and budgets.
- Ensure compliance with government requirements as applicable.
- Prepare funding applications (HUD grants, Low-Income Housing Tax Credits and soft financing).

Development Project Associate, *The Community Builders, Inc.*, April 2017 - April 2019

- Research demographics pertaining to housing and community development.
- Analyze market and project data to determine feasibility and project scope.
- Prepare proposals and tax credit applications.

GIS Analyst, *OKI Regional Council of Governments*, Dec. 2013 - April 2017

- Managed and updated organization-wide geodatabases.
- Assisted planners in using GIS tools to conduct spatial analysis and research.
- Updated and created web-based maps and spatial analysis tools.

GIS Intern, *Philadelphia City Planning Commission*, Jan. 2013 - May 2013

- Updated geodatabase of public and private schools.
- Used network analyst tools to evaluate public school access to other public resources.

Planning Intern, *Northside Community Council*, July 2012-Aug. 2012

- Researched state, federal, and local historical preservation guidelines to evaluate the placement of a neighborhood building on the historical building registry.
- Increased community awareness of upcoming sale of local school building and how it would impact residents.

Student Assistant, *Wellesley College Africana Studies Department*, Aug. 2009 - May 2012

- Chief Editor of *The Griot*, Africana Studies Department Newsletter.
- Researched topics related to the department.
- Organized writers and developed theme for each newsletter.
- Wrote and designed advertisement documents for department events and courses.
- Updated communications materials.
- Assisted professors with daily administrative tasks.

Community Garden Intern, *St. Stephens Episcopal Church and Blackstone Elementary School*, Aug. 2011 - Dec. 2011

- Served as a liaison between elementary-level teachers, Blackstone, and community partners who worked with both Blackstone and St. Stephens.
- Assured that their curriculum prepared students to understand the purpose of a community garden and greenhouse.

National Design Initiatives Intern, *Enterprise Community Partners*, July 2011 - Aug. 2011

- Researched past Rose Architectural Fellows' impact on their community.
- Organized application materials for aspirant Fellows.

EDUCATION

University of Pennsylvania
Master of Urban Spatial Analytics

Wellesley College
B.A. Urban Studies

AFFILIATIONS

Avondale Choice Steering Committee
Member

Affordable Housing Advocates
Preservation Committee Secretary

Urban League of Greater Southwest Ohio
Urban Leadership Program Class 26

Will Scott Professional Dev. Scholarship Cincinnati Wellesley Club
President

Cincinnati GIS User Group
Member

Conference of Minority Transportation Officials
Member, Will Scott Professional Dev Scholarship Recipient

Voices in the Built Environment (VIBE Cincy)
Co-Founder

Imani Family Center
Board Member

Alpha Kappa Alpha Sorority, Inc.
Member

SKILLS

- GIS - ARCGIS 10.5: Spatial Analyst, Network Analyst, Business Analyst
- Programming languages: Python, Javascript, SQL

Shonda McMillian

Operations Support Coordinator &
Development Project Manager

Cincinnati
Metropolitan
Housing
Authority



Multiple years of experience as Administrative Assistant to Higher Executives. Diverse background in the construction and homebuilding industries. Unique experience in all facets of Construction, Purchasing, Sales and Property Management. Self-Starter who is able to handle multiple tasks while being efficient and productive.

PROFESSIONAL HISTORY

Operations Support Coordinator, Cincinnati Metropolitan Housing Authority, April 2013 – Present

- Support to the Chief Operating Officer
- Responsible for the preparation of the PHA's Annual / 5 Year Plan to HUD
- Prepares funding applications (HUD Grants, Low Income House Tax Credit, Historic Tax Credit, Housing Trust Fund, Federal Home Loan Bank Affordable Housing Program).
- Plan and facilitate regular cross-functional project team meetings and provide summary of meetings to team. Follow-up with team members to close out open items identified in project team meetings.
- Generate and issue regular internal and external project reports; ensure the collection of clear, consistent and accurate data for assigned development project.
- Planning of all agency staff member's travel and training requests. Including making out of town travel plans.
- Process Board agenda items and resolutions.
- Ensures compliance with government requirements as applicable
- Revise Project Work Plan as necessary to meet changing needs and requirements. Proactively identify changes in work scope and ensure appropriate planning measures are taken with internal/external clients and HUD to reassess and amend scope of work responsibilities.
- Facilitates all open house and groundbreaking ceremonies on new construction developments.

Division Coordinator, The Model Group, Dec. 2010 – June 2012

- Administrative Assistant to Vice President of Construction
- Assisted 4-6 PM's with daily paperwork such as subcontractor correspondence and billing submittals
- Worked in both the Construction and Accounting modules of Timberline Software.
- Assist with larger construction projects start up. Work with Engineers and Building Department to complete specs and permit information.
- Maintaining schedules and travel arrangements for a Department of 20 employees.
- Process all subcontractor / Vendor AIA invoices through Timberline and Timberscan systems.
- Process all affidavits and lien waivers for construction draws.
- Maintaining an SBE, MBE, WBE and Section 3 subcontractor data base for bid outs.
- Tracking insurance for all Subs / Vendors
- Accounts Payable for all Mgmt. Properties.
- Responsible for submitting closing information for rebate programs.
- Processing all contract packages for future Subs/Vendors on new projects.
- Distribution of all checks to Subs/Vendors.

Property Management Executive Asst., Miller Valentine Group, May 2008 – Dec. 2010

- Administrative Assistant to 4 Executives
- Set and maintain all calendars and travel arrangements for all Executives.
- Department point person for all outside contact with our Division.
- Responsible for all the occupancy reports for a portfolio of over 85 communities including Military Bases.
- Hiring subcontractors and initiating Vendor contracts for all communities.

- Tracking insurance for all Subs/Vendors.
- Executing Property Management Lease Agreements
- Running credit reports on potential commercial clients
- Planning grand openings at all new communities
- Tracking Fair Housing training for all associates
- Maintaining Market Rent Sheets for all communities

Purchasing Agent, Towne Properties, May 2000 – May 2008

- Administrative Assistant to 2 Purchasing Managers and 4 Project Managers.
- Estimate and release all purchase orders for ranch condominium buildings and 12 and 24 unit stacked condominium buildings.
- Estimate and release the purchase orders for condominium units in the \$800,000+ price range.
- Purchasing of all raw materials involved in building 4-24 unit condominium buildings.
- Responsible for contracts between vendors and Towne Properties.
- Process all purchase orders between the Vendor and Towne Properties.
- Responsible for estimating and releasing all option pricing for sales.
- Responsible for getting bids on new products.
- Responsible for estimating all custom design requests from customers.
- Apply for and obtain building permits for all locations.
- Handle customer service calls from both the Vendors as well as the Homeowners
- Liaison between the City of Cincinnati and Subcontractors /Vendors for reporting prevailing wages.
- Review and close final job cost after closing of each unit.
- Maintain and track all Vendors/Subcontractors insurance certificates.

Office Manager, Cambridge Homes, March 1996 – May 2000

- Executive Assistant to the President of the Company.
- All Maintenance of the general ledger including balancing, journal entries and year end close.
- Accounts payables: Maintain cash accounts, invoicing, payments to subs and suppliers.
- Work with local banks on construction loan draw systems for subs and suppliers.
- Prepare 1099'S for subs and suppliers at year end.
- Maintain a job cost system to analyze current and projected cost on all projects.
- Work with Mortgage Co. and Title Co. to prepare and schedule real estate closings.
- Prepare Builders Risk Insurance for all homes.
- Assist the President in monthly cash projections and budgets for the new year.
- Interact with realtors, clients and appraisers on a daily basis to schedule showings on homes and assist in the sales process.
- Work with WCET Action Auction on home donated to the auction in 1999 and 2000.
- All Human Resource functions for 8 employees such as Payroll and Insurance
- Answer phones, order office supplies and other general office duties

Sales Assistant, The Drees Company, July 1989 – March 1996

- Executive Assistant to the Division Manager and Sales Manager
- All correspondence and paperwork for a staff of 8 Market Managers.
- Process all contract paperwork from contract signing to close.
- Maintain all Division financial reports on a weekly, monthly and quarterly basis.
- Assist with year end projects and budgets for the new year.
- Developed a projected closing report for the Division
- Coded and approved all sales invoices.
- Maintain a Bonus Program for all sales employees.
- Served on the ECR Committee (Error Cost Reduction) and the Employee Awareness Committee.

EDUCATION

Gallatin County High School
Graduated with Honors in 1985

COMPUTER SKILLS

Microsoft Word, Excel and Power Point, Groupwise, Outlook and Yardi, Timberline and Timberscan Construction Accounting software, SSWARE Job Costing system, Computerease Accounting system, Buildsoft Accounting system

REFERENCES

Available upon request.

Karin Gandler

Housing Development Analyst

Cincinnati
Metropolitan
Housing
Authority



PROFESSIONAL HISTORY

Housing Development Analyst, Cincinnati Metropolitan Housing Authority, June 2020 – Present

- Coordinates real estate transactions from inception through financial closing, organizing development partners and ensuring all parties are working to meeting respective deadlines.
- Determines project feasibility – oversees underwriting and analysis by creating financial models to ensure favorable return on investment. prepares funding applications to secure capital from sources including HUD grants, Low Income Housing Tax Credit, and others.
- Manages project budgets throughout development process and continually monitors project compliance.

Real Estate Intern, Oakland Planning and Development Corporation, Oct. 2018 - May 2020

- Utilized Microsoft Excel and ArcGIS to perform analysis for a variety of projects, including market research, budget and proforma creation, cost modeling, mapping potential development sites, and geospatial analysis of data.
- Prepared compliance and due diligence reporting requirements for programs including HOME, Section 8, Low-Income Housing Tax Credits, and for state and local regulatory bodies to ensure OPDC's fiscal accountability.
- Organized proposals for grant and loan financing from sources including the city of Pittsburgh, state-wide housing authorities, the Federal Home Loan Bank, and the United States Department of Housing and Urban Development.
- Assisted with predevelopment planning for affordable housing, new property acquisitions and sales into local Community Land Trust as well as financing proposals and financial modeling.

Affordable Housing and Preservation Intern, Los Angeles County Development Authority, June 2019 - Aug. 2019

- Assisted with policy development on major upcoming County ordinances, such as rent stabilization, habitability code enforcement, and tenant protections, researching and analyzing best practices and presenting findings, with recommendations, to high-level County officials at working group meetings.
- Created and led two workshops on Microsoft Excel, focusing one on basic skills, such as data sorting and filtering as well as simple formulas and the second on intermediate skills, including Pivot Tables, data visualization, and more complex formulas.
- Attended development meetings and events, including underwriting meetings, bond financing conference calls, and groundbreaking events, learning about the start-to-finish process of affordable housing development.
- Initiated preliminary research on a County-wide study of displacement, comparing similar studies done in other jurisdictions, and wrote a memo discussing the feasibility of building a predictive model of displacement and making.

EDUCATION

Carnegie Mellon University

Master of Science, Public Policy and Management

California State University, Long Beach

Bachelor of Arts, History and Bachelor of Arts, Political Science

SKILLS

Geographic Information Systems (ArcGIS, MapBox), Microsoft Office Excel (advanced level; data analytics; financial modeling), Word, PowerPoint, Microsoft Access database creation/management, Microsoft Project, Adobe Photoshop, ADP Workforce, Sharepoint, Fluent spoken Hebrew, basic French.