



Authorized Federal Supply Schedule Price List

Mission Oriented Business Integrated Services (MOBIS)

Financial and Business Solutions (FABS)

Contract Number: GS-00F-0009R

**TAG Associates, Inc.
511 Washington Street
Norwood, MA 02062**

Contract Administration

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General Services Administration/Federal Supply Service

Contract Period: 11/23/2014 through 11/22/2019

Business Size: Small Business

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA *Advantage!*™, a menu-driven database system. The INTERNET address for GSA *Advantage!*™ is <http://www.GSAAdvantage.gov>. For more information on ordering from Federal Supply Schedules, click on the FSS Schedules button at <http://www.fss.gsa.gov>

CUSTOMER INFORMATION

1. SINS and Labor Categories

a. Table of Awarded Special Item Number(s) (SINs)

SIN 874-1, C874-1, C874-1RC – INTEGRATED CONSULTING SERVICES

Conducting departmental or organizational assessments with recommendations for improved efficiencies; development of strategic plans to define future goals, objectives and performance measures; development of business plans to guide future operations based upon anticipated sources of funds; conducting compliance audits to ensure conformity with program regulations/requirements; assisting agencies with portfolio planning and deciding where to allocate finite resources.

SIN 874-7, C874-7, C874-7RC – INTEGRATED BUSINESS PROGRAM SUPPORT SERVICES

Redevelopment projects as part of the HOPE VI and other mixed finance and affordable housing programs, serving as program manager and/or financial advisor. Tasks have included the negotiation of development agreements and other evidentiary documents, review and analysis of project financial feasibility, assistance with obtaining funding sources (low-income housing tax credits, HOME, CDBG and FHLB funds, other public and private sources), progress reporting, transitioning to housing and asset management functions and the review of legal, management and financial documents.

SIN 520-1, C520-1, C520-1RC – PROGRAM FINANCIAL ADVISOR

Advised and assisted numerous clients on acquisition and redevelopment projects. Services included market feasibility analysis, development and review of pro formas, preparation of project cash flows and funding source applications, assistance in negotiation of financial commitments with lenders, tax credit investors, underwriters and development partners, review and analysis of transaction documents, preparation and/or evaluation of mixed-finance proposals and assistance with regulations/requirements of major funding sources and housing programs.

SIN 520-7, C520-7, C520-7RC – FINANCIAL AND PERFORMANCE AUDITS

Reviewing the full spectrum of internal controls and sampling protocols in support of its development of internal audit control plans for its housing authority clients with the goal to ensure compliance with budgetary and legal, contractual and regulatory requirements. Conducted risk assessment reviews for larger clients whereby it reviews systems and internal control processes of individual departments to determine vulnerability to risk in several areas, including financial loss and provided recommendations for improvements.

SIN 520-11, C520-11, C520-11RC – ACCOUNTING SERVICES

Ensuring the integrity of financial data, transaction processing, data analysis, the creation of policies and procedures, the review of financial operations and recommendations for improvements, the development of transactional analyses and establishment of accounting and reporting protocols for mixed finance projects, the design and implementation of cost centers and project-based accounting systems and the development, review and analysis of cost allocation methodologies.

SIN 520-12, C520-12, C520-12RC – BUDGETING

Development and monitoring of operating, capital and project budgets, in the drafting of policies and procedures to define the processes, in recommending corrective budget adjustments, in the design and implementation of project-based budgeting systems, in the development of departmental and agency-wide budgets, in the creation of budget tracking reports and in the analysis of revenues and expenses and budgeted versus actual figures.

SIN 520-13, C520-13, C520-13RC – COMPLEMENTARY FINANCIAL MANAGEMENT SERVICES

Expertise in the provision of financial management technical assistance. Services include the development of strategic financial plans to guide future operations, operational reviews with recommendations for improved efficiencies, performance measures and staffing benchmarks, the creation of financial reporting systems, policy and procedure formulation and training and the review and analysis of financial reports and statements.

SIN 520-14, C520-14, C520-14RC – AUDIT AND FINANCIAL TRAINING SERVICES

Provided staff training for large public housing agencies on financial management policies and procedures, on project-based budgeting and accounting systems, on the procurement function, on mixed finance development and the recording of transactions, on cost allocations and on monthly reporting systems. In addition, we have assisted clients in responding to audit findings and implementing corrective actions in response to audits of the HUD Office of Inspector General and conducted mock compliance audits in advance of anticipated reviews.

b. Lowest Priced Model Number

TAG Associates, Inc. provides services only, not products; therefore, the lowest priced model number and lowest unit price for each SIN does not apply.

c. Labor Categories and Rates for Hourly Rate Employees (Applicable to all SINs)

TAG Associates, Inc. offers only personnel who meet or exceed the minimum qualification requirements stated in the labor category descriptions provided herein. Education and experience requirements do not vary by SIN. For the degree requirements, a Masters or Advanced Degree can be in Business Administration, Public Policy, Planning or Law (J.D.); a Bachelor's Degree can be in Liberal Arts, Business or Accounting.

Principal

Minimum /General Experience: Fifteen (15) years of progressive experience

Functional Responsibilities: Serve as primary point of contact for projects; final review and editing of all TAG work products and deliverables; negotiation of project terms and budgets; determination of project feasibility; periodic review of individual and overall project performance; coordination of work of contractors; conducting of meetings with clients, team members and other project stakeholders; establishment of project goals and objectives and overall strategic planning; provide recommendations for improvement as to organizational structure, processes and methods to improve productivity; review of accounting/financial

management policies and procedures; conducting of financial training; review and analysis of financial statements/data; assist and advise in creation of feasible and viable development program; financial advisor as to feasibility and accessing of funding sources; assessment and analysis of privatization

Minimum Education: Master's degree

Senior Associate

Minimum /General Experience: Ten (10) years of progressive experience

Functional Responsibilities: Serve as Project Manager responsible for day to day project operations; assignment of project tasks based upon individual skills and qualifications; review and monitoring of multiple contractor performance; development and monitoring of performance measures and indicators; make recommendations for efficiency improvements in terms of process, productivity and organizational structures; conduct overall program audits and evaluations; review and editing of draft documents; development and monitoring of short and long-term project budgets; periodic testing of transactions to ensure data integrity; review of internal controls; review and analysis of financial data, reports and spreadsheets; drafting of financial/budget policies/procedures; strategic financial planning advisor; conduct training in all areas of financial management and budget process; presentation of costs and benefits of potential privatization of select activity

Minimum Education: Master's or advanced degree

Associate

Minimum /General Experience: Five (5) years of progressive experience

Functional Responsibilities: Data and document gathering, review and analysis; assistance in conducting of organizational assessments/program evaluations; recommendations as to performance indicators, corrective actions and efficiency improvements; creation of draft documents and work products/ deliverables; review of financial management systems and reports and recommendations for improvement; conducting of benchmarking analysis; assist in identification of available funding sources; transaction review and analysis; assist with preparation of training syllabus and materials; review and analysis of cost allocation methodologies; research of relevant rules and regulations and impact as to specific project; data gathering and analysis in support of privatization initiatives

Minimum Education: Master's or advanced degree

Research Associate

Minimum /General Experience: One (1) year of experience

Functional Responsibilities: Preliminary project research; data and document collection and analysis; identification of best practices in public and private sectors; assist in staff interviews for organizational assessments and program audits; assist in development of project management work plans; assist in writing

of sections of draft work products/deliverables; assist in drafting of project progress reporting; review and summarize existing policies and procedures; review of accounting and other financial transactions; data collection in support of budget formulation; assist in creation of course training materials; data gathering in support of privatization analysis

Minimum Education: Bachelor's degree

Ordering:

TAG Associates will accept firm fixed-price and labor hour task orders at the below stated most favored customer rates.

Labor Categories and GSA Rates – November 23, 2014 through November 22, 2019:

	<u>Principal</u>	<u>Senior Associate</u>	<u>Associate</u>	<u>Research Associate</u>
11/23/14-11/22/15	\$221.34	\$175.56	\$125.96	\$99.22
11/23/15-11/22/16	\$225.33	\$178.72	\$128.22	\$101.01
11/23/16-11/22/17	\$229.38	\$181.94	\$130.53	\$102.83
11/23/17-11/22/18	\$233.51	\$185.22	\$132.88	\$104.68
11/23/18-11/22/19	\$237.72	\$188.55	\$135.27	\$106.56

The Service Contract Act (SCA) is applicable to this contract as it applies to the entire OOCORP: Consolidated Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CFR 541.300), this contract still maintains the provisions and protections for SCA eligible labor categories. If and/or when the Contractor adds SCA labor categories / employees to the contract through the modification process, the Contractor must inform the Contracting Officer and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.

2. Maximum Order

\$1,000,000.00. Requirements exceeding the Maximum Order will be processed in accordance with Clause I- FSS-125.

3. Minimum Order

\$100.00

4. Geographic Coverage (Delivery Area)

The geographic scope of this contract includes the forty-eight (48) contiguous states and the District of Columbia. Alaska, Hawaii, the Commonwealth of Puerto Rico and other overseas areas may be included in specific orders. The hourly labor rates for overseas efforts shall be the rates established for the 48 contiguous states adjusted by a Cost of Living Adjustment as defined in the Joint Travel Regulations.

5. Points of Production (City, County and State, or Foreign Country)

Not Applicable. This Schedule is for services, not product.

6. Discount from List Prices or Statement of Net Price

There are no discounts from list prices.

7. Quantity Discounts

All prices shown in this Professional Consulting Services price list are net labor hour rates to the Government; basic discounts have been deducted.

8. Prompt Payment Terms

Not applicable under this contract.

9. Notification that Government Purchase Cards are Accepted

a. At or Below the Micro-Purchase Threshold

N/A - TAG Associates, Inc. does not accept the Government Commercial Credit Card

b. Above the Micro-Purchase Threshold

N/A - TAG Associates, Inc. does not accept the Government Commercial Credit Card

10. Foreign Items (by Country of Origin)

None. Not Applicable.

11. Time of Delivery

a. Time of Delivery (with Number of Days)

This schedule is for services. Delivery schedules of services shall be delineated in task orders.

b. Expedited Delivery

This schedule is for services. Delivery schedules of services shall be delineated in task orders.

c. Overnight and 2-Day Delivery

This schedule is for services. Delivery schedules of services shall be delineated in task orders.

d. Urgent Requirements

This schedule is for services. Delivery schedules of services shall be delineated in task orders.

12. F.O.B. Point(s)

All completed performance will be made FOB destination.

13. Ordering

a. Ordering Address

TAG Associates, Inc.
Attn: Paul Galvin, Associate
511 Washington Street
Norwood, MA 02062
(781) 551-88014200
pgalvin511@aol.com

b. Ordering Procedures

Orders placed pursuant to a Multiple Award Schedule (MAS), using the procedures in FAR 8.404, are considered to be issued pursuant to full and open competition. Therefore, when placing orders under Federal Supply Schedules, ordering offices need not seek further competition, synopsise the requirement, make a separate determination of fair and reasonable pricing, or consider small business set-asides in accordance with subpart 19.5. GSA has already determined the prices of items under schedule contracts to be fair and reasonable. By placing an order against a schedule using the procedures outlined below, the ordering office has concluded that the order represents the best value and results in the lowest overall cost alternative (considering price, special features, administrative costs, etc.) to meet the Government's needs.

14. Payment Address (es)

Check Payment:

TAG Associates, Inc.
511 Washington Street, Suite 101
Norwood, MA 02062
GSA Receivable

15. Warranty Provision

Not Applicable. This is a contract for services, not products.

16. Export Packing Charges

Not Applicable. This is a contract for services, not products

17. Terms and Conditions of Government Purchase Card Acceptance

TAG Associates, Inc. does not accept the Government Commercial Credit Card.

18. Terms and Conditions of Rental, Maintenance, and Repair

Not Applicable. This is a contract for services, not products.

19. Terms and Conditions of Installation

Not Applicable. This is a contract for services, not products.

20. Terms and Conditions of Repair Parts

Not Applicable. This is a contract for services, not products.

21. List of Service and Distribution Points

Not Applicable. This is a contract for services, not products.

22. List of Participating Dealers

Not Applicable.

23. Preventive Maintenance

Not Applicable. This is a contract for services, not products.

24. Special Attributes

a. Special Attributes such as Environmental Attributes

Not Applicable.

b. Section 508 Compliance Information

N/A - TAG Associates, Inc. is a private company, therefore Section 508 does not directly apply. The EIT standards can be found at: www.section508.gov/.

25. Data Universal Number System (DUNS) Number

62-757-9808

26. Registration in Central Contractor Registration (CCR) Database

TAG Associates, Inc. was registered with Central Contractor Registration (CCR) and is now registered in the System for Award Management (SAM) registry. The SAM registry is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS.

**TAG Associates, Inc.
Statement of Corporate Capabilities**

TAG Associates, Inc. (TAG), an innovative small business enterprise, has been providing financial and operational management consulting services to public and subsidized housing providers throughout the country since its incorporation in June 1991. TAG Associates' areas of expertise include the review of entire agency operations or individual departments with recommendations for improvements; the evaluation and assessment of distressed housing; management and operational assistance for the public housing, Section 8 and HOPE VI programs; mixed finance development; financial management, including development and implementation of project-based accounting and budgeting; site-based and asset management; and strategic and business planning. TAG has been active in working with innovative programs in the areas of Moving to Work and Capital Fund bond financing and was at the forefront in the negotiations of the new Public Housing Operating Fund Program on behalf of multiple industry groups and public housing authorities throughout the country.

TAG Associates operates with a core staff based in the Boston area and utilizes a network of highly skilled and accomplished professionals throughout the country. TAG's Principal, Jeffrey K. Lines, has nearly 30 years' experience in public housing, and TAG's Senior Project Managers each have over 15 years of experience as public housing agency managers and consultants. This team has proven effective in addressing the needs of a wide range of PHAs, including rural PHAs, troubled agencies, and large, urban housing authorities.

TAG's experience includes both the provision of management consulting services and financial technical assistance to PHAs as well as direct management and operational oversight of public housing developments and authorities. Our experience enables us to develop ground-up management and operational approaches tailored to the needs of each individual PHA.

TAG is unique in its experience with PHAs through its long-term Receivership of the Housing Authority of Kansas City. As the Receiver, TAG turned one of the most troubled PHAs in the nation into a perennial high performer. TAG also served as the Independent Manager for the District of Columbia Housing Authority during its receivership. In this capacity, TAG provided strategic technical assistance in a number of management areas and retained a full-time, on-site Project Manager to coordinate service implementation and operational support on a daily basis. TAG's overall in-depth understanding of day-to-day public housing operations gives TAG a unique understanding of departmental relationships, their interdependency and the widespread implications of change. TAG brings this depth of experience to each of its PHA clients.

TAG has always been at the forefront of the public housing industry, advocating for updated and improved methods of housing management (including project-based management), developing and implementing forward-thinking financial and strategic plans, working with the most advanced technology systems, and delivering innovative and effective staff training seminars to PHA staff.

TAG's experience and vision have been key to its success in assisting PHA clients of all sizes and capabilities in maintaining their financial stability, increasing their operational efficiency and pursuing successful development opportunities.

TAG Experience – PHA Management and Organizational Assessments

TAG Associates, Inc. has experience conducting and directing comprehensive management reviews of all operational areas of public housing agencies, both through PHA solicitations and for verification of compliance with state and federal housing regulations. During the course of these reviews, TAG interviewed staff in all PHA departments, visited and assessed developments, interviewed residents and community representatives, and, when requested, met with local government representatives. As a follow-up to many reviews, TAG Associates staff have developed long-range improvement plans and provided extensive technical assistance in developing strategic business strategies. TAG has performed such services for PHAs ranging in size from fewer than 50 units to more than 40,000 units. In many cases, PHAs have extended contracts for services with TAG to include assistance in implementing the recommendations contained in review reports.

TAG Experience - Operations of Troubled Public Housing Authorities

TAG Associates has an unparalleled track record in transforming troubled housing authorities into consistent high performers. TAG has worked on the following projects which directly illustrate our abilities in this regard:

Receivership of the Housing Authority of Kansas City, Missouri (September 1994 to Present)

TAG Associates was appointed Receiver of the Housing Authority of Kansas City, Missouri (HAKC) by the Federal District Court of Western Missouri in September 1994. Judge Dean Whipple's Receivership Order mandated that TAG perform the contractual, legal, administrative and personnel duties for the HAKC. HUD formally labeled HAKC as "troubled" in 1991. The Authority's stock was found to be largely distressed, as evidenced by a 43% vacancy rate and a Public Housing Management Assessment Program (PHMAP) score of 44 out of a possible 100. The Housing Authority was faced with formidable challenges in all areas of its operations and was deemed to be in clear violation of the Tinsley Consent Decree, which in part, requires that the Authority maintain its housing stock in a decent, safe and sanitary manner.

The President of TAG, Jeffrey K. Lines, as Receiver, structured a recovery platform that promoted physical transformation, quality maintenance services, staff capacity building, economic viability, tenant self-sufficiency, community stability and the implementation of programs and policies that promoted the overall effectiveness of the Authority.

Each year subsequent to his appointment, the Receiver prepared and submitted for Court review and approval a comprehensive Twelve Month Improvement Plan. In each Plan, the Receiver presented the Authority's leading goals for the ensuing twelve-month period. These goals encompassed the primary objectives of the Receivership and detailed department specific objectives, tasks, performance measures and milestone dates. The Twelve Month Improvement Plans included input from public housing residents, HAKC staff, the City, HUD and the community at large.

As court-appointed Receiver, TAG has visibly demonstrated its ability to markedly improve operations and management of a public housing authority. Extensive improvements and dramatic organizational changes have occurred at the HAKC. HAKC's PHAS score improved from 44% to over 90% by 1998 and the Authority was again awarded High Performer status for both 2003 and 2004. Occupancy rates improved from 61% to over 97%. Once viewed as housing of last resort, the HAKC now represents housing of choice for

low-income residents, as evidenced by the jump in the public housing waiting list from 700 in 1994 to over 4,500 families today. TAG worked extensively in the following areas:

Diagnosis of Problems: As Receiver, TAG began the engagement by performing an extensive review of operations and diagnosing the existing problems at the HAKC. TAG then developed operational improvement plans for the agency and set out to undertake corrective actions in virtually all areas of operations.

Organization and Staffing: TAG Associates particularly focused on organization and staffing at the authority. After hiring a new Executive Director, who worked directly under the President of TAG and was an employee of TAG Associates, TAG reorganized all departments to improve basic housing management services. TAG performed annual evaluations of each department and development to fine tune policies and procedures and assure continual effective functioning.

Management Information Systems: TAG aggressively improved MIS capability at the HAKC. After analyzing the existing system at the beginning of the Receivership, TAG upgraded the system to improve Authority operations and efficiently provide information for HUD and Court monitoring reports.

Admissions and Occupancy: TAG has moved the Housing Authority of Kansas City to the forefront of Public Housing Authority policy in implementing innovative public housing initiatives. Ceiling rents, which have now been changed to flat rents, were implemented to remove the disincentive for stable working families to remain in public housing created by the standard public housing rent calculation. In addition, local preferences for admission have been implemented to increase the number of working families in public housing and site-based preferences for occupancy now allow greater choice to housing applicants. TAG also revised the Housing Authority of Kansas City's Admissions and Continued Occupancy Policy to comply with QHWRA.

Vacancy and Unit Turnaround: The TAG receivership team monitored the vacancy and unit turnaround rates closely and implemented corrective initiatives to assure that the units were occupied and turned around on a timely basis. A management indicator report was assembled every month to include the following: reporting the occupancy status of each development, the turnaround time, the rents collected and the projected percentages of PHAS points that would be received for each indicator. This tool was used to monitor the progress of the HAKC and to plan future management needs.

Maintenance: TAG evaluated the maintenance department and developed site-based management procedures to decrease the role of central maintenance. By scrutinizing work orders, TAG performed numerous surveys of the maintenance work productivity and materials usage. TAG also completed a comprehensive physical needs assessment and developed a comprehensive plan for Section 504, which TAG also implemented.

Finance and Accounting: Under the Receivership, the Finance Department has successfully scored above average on all PHAS financial indicators. The Finance Department has generated several new reports to assist managers in their decision making process and the Authority has a current healthy level of cash reserves.

Procurement and Contracting: TAG created the Procurement and Contracts Department at HAKC. It was created to provide greater control over the Housing Authority's procurement process and to enable effective, efficient and uniform methodologies that would ensure compliance with all federal and state regulatory requirements. This department is responsible for the acquisition of all goods and services for HAKC, as well

as monitoring all contracts to ensure that the Authority receives satisfactory service and performance from all contractors.

Security and Resident Services: Under the Director of Public Safety, the HAKC has developed an effective working relationship with the Kansas City Police Department and worked towards the implementation of community policing, which has resulted in providing greater security to residents. Incidences of crime have dramatically reduced to the point where the public housing developments have lower crime rates than the city-wide average. HAKC also now provides a wide range of resident services and welfare-to-work assistance, both on-site at public housing developments and in the newly constructed Family Development and Learning Center at 299 Paseo. The Authority adopted a comprehensive resident services plan and continually seeks out new resources and community partnerships to provide social and supportive services to HAKC residents.

Real Estate Management: The Receivership undertook several large-scale development and acquisition projects that have provided residents with quality affordable housing in non-impacted communities. TAG and the HAKC successfully applied for three HOPE VI grants for the Theron B. Watkins and Heritage House developments. TAG also prepared a successful Revised Revitalization Plan and obtained HUD approval for HAKC's first HOPE VI program grant for Guinotte Manor. A highlight of these projects is the one for one replacement of all lost public housing units through the development of additional units of scattered site housing in non-impacted neighborhoods of the City. The scattered site program produced nearly 500 additional duplexes, single-family homes and town homes throughout Kansas City, both through new construction and through the modernization of existing dilapidated scattered site public housing units. The first development to receive substantial rehabilitation (\$17 million MROP grant) funding under Receivership was the Riverview Gardens Development. This 232-unit development now houses the Family Development and Learning Center (created with HOPE VI funds), a one-stop center providing a host of services to enable residents to move towards economic self-sufficiency. With over 1900 revitalized public housing units and 7500 housing choice vouchers, the HAKC, under the governance of the Receivership, increased the accessibility, supply and quality of affordable housing to the Kansas City Community. The Authority now serves more than twice the number of households than it did at the start of the Receivership.

TAG Associates' role as Receiver has now changed to that of a Special Master as a result of a court order which allows the delegation of certain decision-making powers to a new Board, subject to Special Master oversight. In preparation for this transition, TAG structured a post-receivership governance process which included the passage of state enabling legislation, the recruitment and training of a new Board of Commissioners and a modified reporting format to reflect the status of current HAKC operations.

Independent Management Team for the District of Columbia Housing Authority (DCHA) (1994- 2000) and Technical Assistance Provider (2000-present)

In a joint venture with the McHenry Company, TAG Associates of the District of Columbia, Inc. (TAG of D.C.) provided strategic technical assistance in a number of management areas to the District of Columbia Housing Authority. Technical assistance covered all major areas of management and operations. TAG retained a full-time, on-site Project Manager to coordinate management with the DCHA on a daily basis. Areas of activity have included:

Selected Relevant Technical Assistance

Organization and Staffing: TAG developed strategies, procedures and policies for reorganizing management and staffing of all departments within the DCHA to reflect a site-based management approach. This reorganization successfully refocused an enormous amount of the agency's resources from centralized administrative services to actual on-site service delivery, i.e., increased housing management and maintenance services.

Through a participatory process, TAG Associates developed detailed operating procedures and policies for all departments in the housing authority. TAG performed in-depth reviews of all departments, identified problems and recommended solutions for improving operating practices.

Management Information Systems: TAG oversaw the creation of an MIS function for the DCHA as it transitioned from functioning as a Department of the District Government to an independent Authority. As part of this transition, TAG oversaw the acquisition and implementation of an integrated public housing software package, the development of a software acquisition strategy, and the outsourcing of the management of its IT services.

Admissions and Occupancy: TAG's role in this area focused on an assessment of existing operations and making recommendations for improvements, assisting in revising the agency Admissions and Continued Occupancy Plan (ACOP) and assisting in developing a reduced reliance on centralized staff in favor of a greater role for site based management staff in screening and lease-up responsibilities.

Vacancies and Unit Turnaround: TAG helped developed procedures for reducing vacancies and improving unit turnaround. In addition, TAG assisted in developing procedures for site-based unit preparation, including staffing, budgets and estimated workloads. After performing an in-depth analysis, TAG developed comprehensive recommendations and assisted the Authority with implementation.

Maintenance and Modernization: After a thorough workload analysis, TAG identified strategies to increase productivity and reduce overtime. TAG finalized sector maintenance work plans and procedures. TAG organized the regionalization of the maintenance response. After a HUD-appointed contractor left DCHA, TAG oversaw the modernization program and its subsequent transition to internal management.

Finance and Accounting: Early on during the separation of DCHA from the District government, TAG Associates developed a financial workout plan for DCHA. The plan presented a three-year financial course of action for the Authority to successfully carry out critical objectives while maintaining and improving its financial health. The DCHA has regularly received above average PHAS financial indicator scores as a subsequent result.

TAG continues to oversee the operations of the finance division and all accounting and budgeting functions, including cash management, payables, receivables, payroll and grants management. In this capacity, it has assisted in the writing of all accounting and budgeting procedures, trained staff, developed financial plans, improved transaction accuracy and timeliness and helped to improve the operating reserve levels of the agency.

Procurement and Contracting: As part of the establishment of DCHA in its separation from District government, TAG helped organize an independent procurement function for the agency. Under the direction of the Receiver, TAG performed a comprehensive assessment of the department and made detailed

recommendations to the Receiver. Some of the problems identified include excessive staffing, the inability to write effective specifications, the inability to execute contracts and numerous HUD findings. Since that time, TAG has assisted in writing procedures, reorganizing the department and decentralizing the duties to rely more on field staff in the procurement and contracting processes.

Security and Resident Services: In the area of Resident Services, TAG has assisted the agency in re-directing its focus by reducing its reliance on limited operating funding and aggressively pursuing grant funding. This approach has led to increased funding and increased services available for public housing residents.

Energy Consumption and Conservation: TAG has assessed DCHA's utility consumption records and prepared the authority to pursue an energy and water conservation services performance contract. TAG oversaw the development of a current and regularly updated utility allowance schedule.

Section 8: TAG has worked with the Section 8 Director to realign and reassign staffing in an effort to accomplish three things: improve productivity, improve program compliance and improve lease up. All of these efforts have been successful. The program has more units under lease than ever before, the occupancy rate is up, audit findings are down and administrative fee reserves have increased.

Real Estate Management: TAG assisted in the on-going development of an asset management capability that allows the DCHA to manage its own sites and oversee private-management companies. These procedures are performance-oriented and include methods for evaluating the property management on a monthly, quarterly and annual basis. As a result of TAG's efforts, the authority has increased rent collections and improved occupancy rates.

TAG Experience - New Operating Fund Rule

The new Operating Fund final rule recently issued by HUD fundamentally changes the way in which operating subsidy is calculated and will require major changes to the accounting, budgeting and property management functions for most PHAs. It is essential that public housing professionals clearly understand the new requirements if they are to have any chance of maximizing their funding received from HUD. In spite of the lack of official guidance on implementation requirements, PHAs who are subsidy "losers" under the new rule must act quickly to implement a broad range of financial and operational modifications if they are to minimize their subsidy loss in the coming years. TAG Associates' involvement in the negotiated rulemaking process has given it an insiders' understanding of the new subsidy formula and asset management requirements. TAG's also has direct experience in the design and implementation of models and systems for project-based budgeting and accounting, as well as site-based management.

Project-Based Accounting and Project Management – TAG's experience in this area is extensive. TAG's Principal directed the development of HUD's research in Project-Based Accounting (PBA) and the actual development of the HUD Project-Based Accounting Guidebook for PHAs and HUD staff. Members of the TAG team have developed comprehensive management plans for moving housing developments to site-specific management systems and alternative management. TAG has also assisted numerous large PHAs in the development of project-based accounting and budgeting systems with cost centers, including Dade County, Indianapolis, San Francisco, Detroit, Kansas City and the District of Columbia. The integration of management systems and responsibilities for delivery at the site level is a major feature of TAG's approach to addressing the challenges facing public housing agencies and housing developments.

Project-Based Management - TAG Associates has been a leading proponent of site-based management for PHAs. TAG Principal Jeffrey K. Lines has for 15 years been part of a national effort to introduce site-based and asset-based management to public housing. As a Senior Advisor to the National Commission on Severely Distressed Public Housing, and as a principal consultant to the Harvard Public Housing Operating Cost Study, Mr. Lines has worked to identify the need for site-based management of public housing and has developed models for nationwide adoption by PHAs. Utilizing its wide range of experience in all areas of housing management and related operations, TAG has successfully developed and implemented site-based management systems for a number of large public housing authorities, including Kansas City, Philadelphia and the District of Columbia and assisted countless others in utilizing site-based management strategies for certain functions. TAG has just recently completed an engagement at the Housing Authority of the City of Pittsburgh where it assisted with their implementation of site-based management that included the drafting of numerous policies, procedures and other written materials.

Asset Management - TAG Associates has been in the forefront of developing asset and site-based management at large public housing authorities. TAG has spent the last 13 years successfully developing and implementing asset-based management for public housing authorities. A significant part of the asset management protocol is the use of a formal site visit procedure that supplies a framework for the asset manager to review activities at the site during a monthly formal meeting. A greatly expanded version provides for an annual management audit. The annual audit is anticipated to take a day or longer and contains a series of action steps, file reviews, and data analysis. The intent is that the audit be performed prior to any annual contract negotiations for privately managed sites. In addition, there are supporting protocols describing what asset managers should be evaluating and looking at, as well as revised job descriptions for asset managers which relate directly to performance measures established at the beginning of the year. Asset management protocols have been implemented by TAG in Kansas City, Detroit, Philadelphia, New Haven and the District of Columbia.

TAG has been a leader in development of management procedures for PHAs overseeing private property management firms. Drawing on our many years of experience with private management of public housing and formative role in bringing mixed financing to public housing, TAG has worked with a number of major Housing Authorities to effect a transition from the traditional public housing management model to the advanced asset management models used in the management of private market properties. TAG has developed and implemented RFPs for alternative management entities and developed formal procedures for overseeing the private management of PHA developments.

TAG Experience - Financial Management

As one of the leading providers of financial management technical assistance in the public housing industry, TAG Associates' areas of expertise in this area include the following:

- Financial management
- Strategic planning
- Long-range financial planning
- Project-based accounting and budgeting
- Financial analysis of staffing organization and levels
- Budget development and monitoring

- Financial reporting
- Audit management
- Expenditure forecasts
- Budgeting and accounting for mixed finance developments
- Resource allocation
- Cost allocation methodologies
- Private Management setup, review and oversight

Financial Management and Accounting - The TAG Associates team possesses some of the strongest qualifications in this field. Team members have more than fifty years of combined experience in developing effective financial and operational management plans to address the needs of financially troubled PHAs. Team members have experience developing rent collection and tenant accounts receivable systems and programs, budget reporting and planning systems (i.e., program and property- based income and expense reporting systems) and installing new accounting and audit management systems. Members of the team have developed guidebooks in financial management for PHAs, Resident Management Corporations, HUD and public housing staff. The HUD Office of Inspector General (OIG) called upon TAG to develop a guidebook, used by HUD field offices, for implementing and monitoring Cooperation Agreements between localities and PHAs.

Financial Planning - In recent years, TAG has developed several authority-wide Financial and Business Plans for PHA clients, including Baltimore, Kansas City, Detroit, Washington DC, New Haven, Houston and Pittsburgh. These plans forecast revenues and expenditures over several years and identify and propose strategies to enable the client PHA to accomplish their stated programmatic goals and objectives. The core of these plans is the development of long-range funding and expenditure projections which are based on forecasts of the PHA's portfolio, along with management assumptions about key operational components. They further include the impact these assumptions will have on funding, operations, staffing and the delivery of key housing services. The plans present the goals and objectives of the subject PHA and finish with strategies designed to best enable the agency to meet those critical objectives. These financial plans have also included components dealing with subsidiary entities, such as non-profits and/or housing development sub-entities. These plans have been instrumental in assisting clients to successfully establish and implement complex organizational restructuring efforts and successfully manage change through dramatically declining funding cycles.

Internal Controls and Audits - TAG has direct experience in developing internal audit and quality control programs for public housing, including the creation of offices of internal audit for public housing authorities. Systems for internal audit and quality control are essential to ensuring that the risks inherent in any organization are adequately assessed and treated within the context of normal PHA operations. No organization, including public housing authorities, should ignore the need to adequately ensure that internal control systems and procedures are in place and operational at the agency. TAG Associates has reviewed Inspector General reports at multiple PHAs and developed strategies to address the findings. We have established audit programs at housing authorities in Dade County, Kansas City and Detroit. TAG also developed, under contract with the OIG, a guidebook for implementing and monitoring public housing Cooperation Agreements in use by HUD and PHA staff.

TAG Experience – U.S. Department of Housing and Urban Development

TAG has substantial experience in working with HUD as illustrated by the following:

- Served as Recovery Team Manager and Project Director for the development of a Memorandum of Agreement (MOA) with HUD for the Detroit Housing Commission.
- TAG Principal served as Senior Advisor to the Public Housing Operating Cost Study charged by HUD with assessing operating costs and funding for the nation’s federal conventional low rent public housing program.
- TAG Principal served as the lead industry negotiator on the new Operating Fund rule on behalf of NAHRO, CLPHA, PHADA and NOAAH
- TAG Principal served as Project Director to analyze project-based financial management systems and to develop a model project-based accounting system for the entire federally-assisted conventional public housing program. This project included a Final Report on the year-long research study and a Guidebook for implementing the model project-based accounting system, both of which were published and distributed by HUD.
- TAG Principal served as lead technical consultant for National Commission on Severely Distressed Public Housing, whose work formed the basis for the formation of the HOPE VI program.
- TAG has successfully worked on capital bond financing approvals from HUD for PHAs in Kansas City (comprehensive modernization of family development) and the District of Columbia (agency wide modernization improvements)
- TAG Principal drafted Guide to Cooperation Agreements that was published by HUD
- TAG Principal served as Case Study Manager for various HUD-funded evaluation projects.
- TAG has negotiated with HUD on Moving to Work Agreements for PHAs in Philadelphia, Baltimore, and the District of Columbia
- TAG has worked with HUD Central and Field offices on approvals for various documents, including Revitalization Plans, Designated Housing Plans, Demolition and Disposition applications and Mixed Finance Proposals

TAG Experience - HOPE VI

TAG Associates has extensive experience in the area of HOPE VI programs since its participation as lead consultant in the National Commission on Severely Distressed Public Housing (NCSDPH), whose work formed the basis for the HOPE VI program. TAG Associates has participated in numerous HOPE VI revitalization projects and is presently providing program management services on three HOPE VI grants and a number of others at the near completion stage: TAG provides development and Community Services Technical Assistance for a wide variety of projects.

National Commission on Severely Distressed Public Housing

TAG Associates, Inc. was the lead consultant and coordinated commission activities and oversaw case studies and report writing for the assessment of distressed housing throughout the U.S. These case studies served as the basis for the subsequent creation by Congress of the HOPE VI Revitalization program.

Selected Functional Areas

Several of TAG Associates, Inc.'s projects are quite specific, focusing on a particular aspect of a housing agency's operations. TAG Associates has worked on projects in numerous functional areas, including the following:

- **Resident Services:** TAG Associates has developed and implemented numerous resident services and economic development programs. These programs include assistance in program design and implementation of HOPE VI resident services components in Detroit, District of Columbia, and Kansas City, MO.

Additionally, TAG implemented the Housing Authority of Kansas City's (HAKC's) One-Stop-Shop, as defined by the Workforce Investment Act (WIA) and the Family Self-Sufficiency Program (FSS). TAG also assisted in securing a joint HHS/HUD funded grant for Resident Uplift and Economic Development for HAKC—one of only six awarded nationally in 1997. TAG continues to work with HAKC to develop welfare-to-work and self-sufficiency programs and collaborations with other local organizations, such as the local Private Industry Council and the Missouri Department of Family Services. TAG also facilitated the reorganization of the HAKC Resident Services Department, and the transitioning of the Department into a nonprofit entity.

TAG Associates, Inc. has an extensive track record in the implementation of effective welfare to work and self-sufficiency programs. This includes documented successes in Kansas City, Missouri where Family Self Sufficiency programs are generating positive results. Kansas City's FSS program includes a collaboration with the local Private Industry Council and the Missouri Department of Family Services with joint outreach, intake and referral systems.

- **Section 3:** TAG Associates has been a leader in the development of programs for Section 3 participation, including:
 - Creation of Section 3 policies and procedures
 - Creation of Section 3 plans
 - Training of staff in Section 3
 - Management and oversight of Section 3 programs

Recent Section 3 experience includes writing Section 3 plans for Kansas City, District of Columbia, Muncie, and Detroit capital improvements programs, and for other housing authorities. TAG has assisted in training staff on these important procedures. In Kansas City, TAG is working with residents in the business development of an RMC which contracts with the Authority for maintenance activities. TAG has developed Memoranda of Understanding

(MOU's) with contractors regarding Section 3 efforts and innovative resident training programs on current HOPE VI projects.

NON-PROFITS

TAG has assisted PHA's in the development and utilization of their non-profits. In Kansas City, TAG assisted the Resident Management Corporation in developing a business plan and creating a construction firm that worked on HOPE VI and other projects and was featured in a HUD HOPE VI video.

TAG has provided recent and on-going assistance to PHA's in New Haven and Springfield, IL. related to the use of their non-profits as development participants,

TAG recently reviewed the innovative use of non-profits by the Cambridge (MA) Housing Authority for the development of assisted living facilities as part of a Moving to Work review and analysis for the CHA.

COMMUNITY AND SUPPORTIVE SERVICES

TAG Associates has significant experience implementing successful HOPE VI projects within the context of the neighboring community. One of the primary assets is our ability to communicate our intentions, and that of HUD, in a sometimes skeptical, politically charged environment. The principal of TAG Associates Inc., Jeffrey Lines, has spoken at HUD HOPE VI Symposiums, at hearings held by the U.S. Congress, to City Councils, and to resident and neighborhood groups, as well as written extensively about the program. We are skilled at creating newsletters for residents, multi-lingual if necessary, and have prepared briefing memos and press releases for the Housing Research Foundation, HUD's public relations arm for the HOPE VI program, Public Housing Authority Executive Directors, and Mayors interacting with HUD.

RELOCATION

TAG Associates has guided the relocation process for numerous projects. Relocation planning and resident tracking are integral to the redevelopment process and is one of the areas most open to external criticism of the program if not managed correctly. TAG has overseen all relocation for the many projects for the Kansas City (MO) Receivership under the direct observation of Legal Aide, and has also worked with Fresno on relocation and resident tracking issues.

In many cases, capital improvement programs will require the temporary relocation of residents prior to permanent re-housing. Temporary relocations may be into units owned or leased by the Authority. Units will be in the development where the resident resides (on-site) or at another off-site location. The residents will be counseled and provided relocation assistance in accordance with the provisions of the Uniform Relocation Assistance and Real Property Act of 1970 and the implementing regulations.

TAG Experience – Mixed Finance Development

Since the firm's inception, TAG has been a pioneer and assisted numerous public housing agencies in revitalizing their distressed housing stock through mixed finance development. TAG has provided housing authorities with technical assistance at all levels of the redevelopment, including the writing of funding applications, revitalization plans and relocation plans, the preparation and submission of demolition/disposition applications, the development of project budgets, pro formas and management plans. Project financing with which TAG is experienced includes HOPE VI, Low Income Housing Tax Credits, HOME, CDBG funds, Tax Increment Financing (TIF) districts, Tax Exempt bonds, AHP funds through the Federal Home Loan Bank and numerous other public and private funding sources.

TAG has also assisted Housing Authorities with the transition to the operational period of the mixed- finance developments and in understanding and fulfilling their regulatory and fiduciary responsibilities with regard to conducting oversight and assuring regulatory compliance. This has involved analyzing and summarizing project evidentiary agreements, familiarizing staff with Housing Authority oversight responsibilities, preparing guides and other materials for use by the PHA in compliance monitoring and assisting with on-site management and compliance reviews at mixed-finance developments.

TAG Experience - Section 8 and SEMAP

TAG Associates has experience in providing reviews of and technical assistance in the area of Section 8 operations. As Court-Appointed Receiver of the Housing Authority of Kansas City, Missouri, TAG conducted an initial management audit and operational review of the Authority's Section 8 Program and worked with the staff to successfully implement the recommendations. TAG was involved in revising the Administrative Plan, in developing new forms, in updating the rent reasonableness database and in ensuring compliance with all HUD regulations. Since the start of Receivership, the Authority has substantially increased its voucher utilization, has absorbed hundreds of additional units previously administered by the Missouri Housing Development Commission (MHDC) and has worked closely with its landlords to improve program delivery, including the establishment of a Landlord Advisory Board and an Evaluation and Monitoring Committee. The Authority has consistently earned Standard Performer status under SEMAP and is approaching High Performer status as it continues to demonstrate improved service delivery.

As part of providing ongoing technical assistance to the District of Columbia Housing Authority, TAG has worked significantly on their Housing Choice Voucher Program. This work has included the development and revision of policies and procedures, including the Administrative Plan, the review and revision of the Authority's quality control procedures, the conducting of independent SEMAP audits and the preparation of the annual SEMAP self-certification, the conducting of quality control reviews focusing upon rental integrity and compliance with existing policies/procedures, tracking patterns of error and making skills retraining recommendations and the review of payment records and landlord accounts as a means to improve the administration of the Moderate Rehabilitation program.

Additionally, TAG has worked or is currently working with PHAs in Baltimore, the District of Columbia and Philadelphia on the redesign of their Housing Choice Voucher Programs under the authority of Moving to Work (MTW). TAG has conducted operational reviews of Section 8 Departments as a part of a broader organizational assessment for PHAs in Detroit, New Haven, San Francisco, Houston, Quincy (MA) and Philadelphia. Finally, the President of TAG has been retained as an expert witness by PHAs regarding Section 8 litigation that has involved the lawful termination of a Housing Assistance Payment (HAP) contract by the

Authority in its Moderate Rehabilitation program and the denial of payment of a performance bonus by a PHA to its private contractor charged with Section 8 program operations, shaped in part by the failure of the contractor to meet agreed upon SEMAP indicator performance. Finally, TAG has worked for PHA clients to construct Section 8 budgets, determine and submit year-end settlements and provide guidance on implementation of appropriations rules changes as it relates to the funding of the Section 8 program.

TAG Experience - Moving-To-Work (MTW)

TAG has assisted the Housing Authorities of Cambridge, Pittsburgh, District of Columbia, Philadelphia, Seattle and New Haven in all aspects of MTW preparation and implementation. Specific service components have included assisting in developing the MTW agreement with HUD, assisting in developing the MTW annual plans, assisting in submitting annual MTW reports and assisting with modifying MTW programmatic plans. In all cases, TAG has worked closely with both the client PHA and HUD in securing approvals. Our understanding and experience with the MTW program is extensive and has been extremely effective both in terms of developing actionable plans and in securing necessary approvals.

TAG Experience – Admissions and Occupancy

Collectively, TAG Associates has reviewed the admissions and occupancy procedures of a number of housing authorities, specifically in the areas of processing applications, screening for eligibility, record keeping, initial and annual verification of income and rent calculation, rent collection, lease enforcement and evictions. These reviews have included checking for compliance with federal and state regulatory requirements, conformity to federal and state regulatory agency policies and overall efficiency in administration. Assessments have occurred for both low-income housing and Section 8 programs. Recommendations for improvements are always included in such reports.

TAG Experience – Procurement and Contracting

TAG has been actively involved in developing procurement and contracting systems and procedures manuals for multiple PHA clients. TAG has developed and implemented a comprehensive procurement manual, desk reference and policies for the Housing Authority of Kansas City. TAG has successfully implemented Materials Requirements Planning (MRP) programs at PHAs that offer the best features of private sector procurement and inventory planning for public housing. TAG and its team members are also actively involved in the successful implementation of decentralized procurement systems and Section 3 requirements. TAG has extensive experience in all areas of procurement, from the purchasing and handling of maintenance-related materials and supplies to soliciting bids from and contracting with professional service providers, including construction contractors, private property managers, developers and architectural/engineering (A/E) firms. TAG has conducted procurement reviews, provided recommendations and developed comprehensive procurement policy and procedure manuals for several housing authorities, including the District of Columbia, Dade County, Detroit, Rochester and Indianapolis. In addition, TAG has performed an analysis of the procurement policies and procedures of the Housing Authority of the City of New Haven

(HANH), provided suggestions for improvements and developed and conducted procurement training for the entire HANH staff.

TAG is well-versed in the public procurement requirements as contained in Chapter 24 of the Code of Federal Regulations and HUD's Procurement Handbook. We also have experience in the review of multiple state procurement regulations in terms of PHA compliance, both in terms of their policies and procedures not violating any state statutes or regulations and the compliance of purchasing activities with state requirements.

TAG Experience – Public Housing Authorities

TAG has closely followed and participated in the PHAS revised rulemaking process through our participation in the HUD Finance and Real Estate Assessment Center (REAC) housing inspections rules committees. As Receiver, and now Special Master, of the Housing Authority of Kansas City, Missouri (HAKC), TAG Associates has worked extensively with the Housing Operations Department on its annual PHAS submissions to HUD. TAG has implemented monthly indicator and sub-indicator tracking reports that monitor HAKC PHAS scores for each Management Sub-Indicator by development. These reports allow managers and Housing Operations staff to address specific problems with sub-indicators at the development level. HAKC has been classified as a "High Performer" under PHAS three (3) times during our tenure. TAG Associates has also performed several PHAS assessments of troubled housing agencies under contract with HUD. In conjunction with these assessments, TAG has developed numerous improvement strategies for troubled public housing agencies.

TAG Experience - Rental Assistance Demonstration (RAD)

While the Rental Assistance Demonstration (RAD) is a new program, TAG is particularly knowledgeable in this new program through on-going work with HUD predecessor initiatives such as TRA and PETRA, on-going work with a number of clients, and in particular, its participation on an early RAD webinar, where TAG provided a case study of the presentation. TAG has written numerous successful RAD applications for PHA clients which are proceeding towards CHAP.

Additionally, TAG provided RAD training at the most recent Florida FAHRO conference. For RAD applications, TAG has developed its own combined workbook and spreadsheets which capture operating and development pro formas, as well as RAD data such as incomes and expenses and capital needs. TAG uses this internal model prior to using the available HUD RAD planning tools in an effort to evaluate financial feasibility. The TAG approach accounts for sources and uses as well as tax credit and lender assumptions, and provides more detailed guidance as to actual project financials.

TAG developed this because while adequate for applications and funding, the HUD tools do not provide all the necessary analysis needed for a final project. Perhaps the strongest attribute of TAG Associates is the close relationship shared with the RAD Team at HUD. A constant line of open communication allows TAG to acquire answers and address issues concerning RAD promptly.

TAG Associates, Inc. has successfully assisted numerous PHA clients through the RAD process from the Assessment phase to submitting successful RAD applications, and from the Award phase and into development.

TAG Experience - Maintenance Operations

TAG's experience in Maintenance Operations covers all aspects of essential maintenance services ranging from the evaluation and development of effective maintenance and work order systems, preventive maintenance programs, HQS inspections and correction programs, development of repair programs to reduce routine maintenance needs, delivering effective training programs, etc. Team members possess a broad range of maintenance operations experience with proven track records in public housing. TAG staff has been responsible for the daily operation of housing maintenance at all levels. TAG has developed and implemented maintenance improvement programs at many "troubled" PHAs, and has extensive experience with defining maintenance problems and developing practical solutions that have produced major improvements on PHAS scores at troubled agencies.

TAG Experience - Modernization and Capital Planning

TAG Associates and its team members have worked together in developing Comprehensive Plans for PHAs from coast to coast (i.e., from the District of Columbia to Kansas City to San Francisco). TAG has overseen the modernization departments in both Kansas City and the District of Columbia. In its Kansas City role as Court-appointed Receiver, and now Special Master, TAG oversaw the complete modernization and/or revitalization of the Authority's entire public housing portfolio and has in fact increased the number of affordable housing units now available for low-income families.

The development of strategies and approaches to address the needs of modernization troubled PHAs is a major part of this team's experience. TAG has provided a variety of services related to the maintenance, management and modernization of physical facilities. Large scale assessments have been performed for the Capital Fund Program (and predecessor programs) for large PHAs. Other services have included the inspections of housing units and developments, the development of cost estimates for the modernization of developments and the design of preventive maintenance programs to reduce the need for future capital improvements.

TAG was a key member of a team that developed the tools for HUD used by PHAs in assessing the viability of all PHA developments that meet certain HUD "distressed" criteria. In addition, TAG conducted Section 202 assessments and strategic planning for the Chicago Housing Authority that included a 20-year physical needs assessment and plan and the development of an innovative categorization scheme that measures all developments by neighborhood, physical condition, and ease of management.

TAG has performed similar capital needs assessments in Philadelphia and Rockford (IL) to assist the PHAs in deciding where to invest increasingly scarce resources based upon the future viability of individual properties.

TAG Experience - Training Programs

TAG Associates has designed dozens of customized training programs for housing providers, non-profit organizations, resident organizations, and other agencies. TAG has developed:

- Curriculum and materials
- On-site programs
- Fundamentals of accounting and financial management
- Project-based budgeting systems

TAG Experience - Management Information Systems

TAG Associates, Inc. has experience in many aspects of housing authority data processing and management information systems, including design, development and implementation. TAG's computer expertise includes the following areas:

- System conversion, system audits and evaluation;
- Assisting PHAs in data processing needs assessments and developing corresponding specifications; and
- Developing specifications and supervising installation of various computer applications.