



K&J Strategic Solutions

**Ad Hoc Housing Diversity Study Committee Consultant
Proposal
for Town of Cape Elizabeth**

Prepared by:

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&

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Background & Executive Summary

Background

The Town of Cape Elizabeth is performing a Housing Diversity Study, as part of the 2019 comprehensive plan. The study will evaluate current housing costs, needs, impacts on services and other relevant elements in the town and recommend actions to create a more affordable and attainable housing opportunities in the Town of Cape Elizabeth. As part of this study, the Town of Cape Elizabeth is creating an Ad Hoc Housing Diversity Study Committee with the charge of furthering research to identify housing needs and issues as perceived by residents of Cape Elizabeth. This specific request for proposal was issued to seek a professional consultant to provide staff support to the Ad Hoc Diversity Study Committee.

Executive Summary

At K&J Strategic Solutions, LLC we understand the importance of ensuring that committees are well managed and have the support they need to accomplish their goals. The K&J consultants, Kristina Musante, JD, and Joshua Biehler, MPS, have worked with hundreds of nonprofit organizations' board of directors and local city government committees. As specialized equitable community development consultants, we know how important supporting committees, engaging community members and gaining the support of the town and residents is to success of an initiative. K&J is submitting this proposal to help ensure the committee runs smoothly and effectively. K&J will support the committee in any possible way, using our expertise in community engagement, fair housing, AFFH, CRA, affordable housing, racial equity, equitable community development, and effective organizational capacity building and management.

Workplan

As mentioned in the Executive Summary, K&J Strategic Solutions is willing to support the community in any way necessary with meeting support, community engagement, training, data collection and analysis, and other strategies. The consultants understand the necessity to be at every meeting which will include preparing the minutes and agenda, then to be approved by the board chair and submitted to the town for uploading on the town’s website. As the anticipated amount of support needed per meeting will vary depending on the topics of discussion and needs of the committee and residents, the following work plan using the Scope of Work, as an overview of what we anticipate the needs to be.

Goal 1: Support staff of Ad Hoc Housing Diversity Study Committee				
Action Steps	Timeline	Expected Outcome	Data Source/Evaluation Methodology	Person Responsible
Attend each meeting	Once a month attend committee meeting (in-person, virtually, hybrid)	K&J will be fully informed at each meeting and able to prepare materials for the next meeting.	Roll call at each committee and materials provided by K&J.	K&J Strategic Solutions Board Chair Committee
Prepare agendas, minutes, & supporting materials for meetings	Once a month, a week and a half before the next meeting submit documents to committee for review. Make any edits to materials before sent to the town for uploading on website.	Well-developed minutes, agenda, and materials for residents to understand. The board chair and committee approve of the written materials. The materials are uploaded to the town’s website a week before the next meeting.	The committee, board chair, and town approve of materials. The materials are uploaded to the town’s website a week before the next committee meeting.	K&J Strategic Solutions Board Chair Committee

Consult on the Freedom of Access Act (FOAA)	At each meeting, ensure the committee and materials complies with FOAA.	Transparency with the residents of the Town of Cape Elizabeth.	Review of FOAA.	K&J Strategic Solutions
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Goal 2: Support the committee's development & implementation of the public participation plan.				
Action Steps	Timeline	Expected Outcome	Data Source/Evaluation Methodology	Person Responsible
Develop a public participation plan	Depending on committee, recommends within the first quarter, develop a plan to gain public participation.	A developed plan to gain public participation in the Housing Diversity Study.	The developed plan.	K&J Strategic Solutions Committee
Implement public participation plan.	Depending on the committee, recommend implement the plan during the second and third quarters.	Participation from the residents through vehicles developed through the plan.	Dependent on the vehicles deployed from plan, but participation numbers from the residents.	K&J Strategic Solutions Committee
Analyze data from participation plan.	Work with the committee to analyze data from the participation plan during the third and fourth quarters.	A rough draft of data for a final report to the Town Council.		K&J Strategic Solutions Committee

Goal 3: Preparation of status report and a final report				
Action Steps	Timeline	Expected Outcome	Data Source/Evaluation Methodology	Person Responsible
Prepare status reports	Besides the monthly reports, recommend providing a more detailed quarterly report on the committee's impact.	Status report for the town staff and residents of Cape Elizabeth to be posted to town website.	Status reports approved by the committee.	K&J Strategic Solutions Committee
Prepare a final report.	At the end of the contract term (12 months), prepare a final report for the committee.	A final report detailing the plans and impact of the Housing Diversity Study.	Final report approved by committee and town staff.	K&J Strategic Solutions Committee

Goal 4: Support obtaining expert speakers				
Action Steps	Action Steps	Action Steps	Action Steps	Person Responsible
Potentially obtain expert speakers	Potentially obtain expert speakers	Potentially obtain expert speakers	Potentially obtain expert speakers	K&J Strategic Solutions

Goal 5: Attendance at one Town Council meeting				
Action Steps	Timeline	Expected Outcome	Data Source/Evaluation Methodology	Person Responsible
Attend Town Council Meeting	End of the contract term.	K&J will be at the Town Council meeting to present the final report.	Attendance and final approved report.	K&J Strategic Solutions

About K&J Strategic Solutions, LLC & References

About K&J Strategic Solutions

K&J Strategic Solutions, LLC comprises of two consultants, Kristina Musante, JD, and Joshua Biehler, MPS. The consultants will both be the project leads because of their combined experiences and knowledge of housing, diversity, local governments, fair housing, and administrative tasks. The consultants will attend every meeting (14 in total), in-person, virtually, or in a hybrid mix. K&J have over 30 years' of experience assisting nonprofits, local governments, and communities to build their capacity and resolve some of society's most complex challenges. K&J believe nonprofits and local governments are essential and courageous partners in communities. The consultants have worked with nonprofit groups and local governments across the country to create and help implement two-to-five-year strategic plans that further their missions and achieve their overall goals. K&J's work is grounded in creating a more equitable and just society. As well as assisting nonprofits and local governments in utilizing civil rights laws like the Community Reinvestment Act and the Fair Housing Act to garner resources and funding from banks and government entities. The consultants encourage nonprofits, local governments, and communities to take a hard look at their strengths, weaknesses, and opportunities to build plans that creates meaningful impact. K&J 's mission is to improve your communities' capacity and ability to achieve its goals, using our expertise, guidance, support, and advocacy.

K&J Strategic Solutions' values are rooted in equity, diversity, and inclusion. K&J Partners, Kristina Musante, and Joshua Biehler are lifelong advocates of racial and social equity. Kristina spent her career fighting for the rights of people of color while educating communities and leaders about strategies to remedy the injustice through her work with Community Legal Services, ACLU, and NCRC. Joshua has also spent many years in the trenches working to help marginalized communities improve their opportunities for quality employment, homeownership, and wealth-building by championing financial education for low-income people.

Meet the Consultants



Kristina Musante, JD, Partner: Kristina has over 25 years' experience advising and directing nonprofit, local governments, and advocacy groups in strategic planning, community engagement, and capacity building. She is the former director of NCRC's National Training Academy and campaign manager for the ACLU where she worked closely with local governments and community groups to remedy complex injustices from wrongful death sentence convictions to lack of required government investment in communities of color. Kristina specializes in capacity building and resource development for organizations and campaigns that strive for equity and economic justice. She is an expert in enforcing the Fair Housing Act, Affirmatively Furthering Fair Housing (AFFH) Rule, and Community Reinvestment Act (CRA) to advance equitable community development. Kristina holds a law degree from Florida A&M College of Law and is a lifelong advocate for racial and social justice. Kristina enjoys gardening, cooking, comedy, and traveling in her free time. She lives in Northern Virginia with her family and dogs.

For more information, see attached resume in Appendix A.



Joshua Biehler, MPS, Managing Partner: Joshua is passionate about helping individuals and organizations succeed and prosper. Joshua has over ten years of management experience, and within the nonprofit sector, he specializes in housing counseling training, advocacy, and equitable community development. Joshua specializes in staffing, employment and community engagement, and organizational development. Joshua has spent over a decade developing individuals and organizations through his work at the Library of Congress, The Phillips Museum, Signature Theatre, and the National Community Reinvestment Coalition (NCRC). He earned a master's degree in Organizational Change and Development from Penn State University. Joshua recently earned certificates in Inclusive Leadership: The Power of Workplace Diversity from the University of Colorado and Diversity and Inclusion for HR Professionals from the University of California. Joshua is also certified in the DISC assessment, a tool to help improve teamwork, communication, and productivity in the workplace.

In his free time, including hiking and kayaking. Joshua is also an amateur photographer who loves the beauty of nature and all its mastery.

For more information, see attached resume in Appendix A.

References

MakingChange Inc.

MakingChange Inc, located at 9770 Patuxent Woods Drive, Suite 307 Columbia, MD 21046, is a housing counseling agency. K&J served as the strategic planning consultant and facilitator for the 2022-2024 Strategic Plan. This occurred from May 2021 to October 2021 at the cost of \$5,350. The scope of work included organizational assessment, board phone interviews, strategic planning retreat facilitation, follow-up committee meetings, and drafting of the final strategic plan. Jasmine Brewer is the Executive Director and can be reached by email at jbrewer@makingchangecenter.org or by phone at (773) 577-1988.

HomeStart

HomeStart, whose principal office is located at 803 N Church St, Rockford, IL 61103, is a housing counseling agency. K&J served as the consultant facilitator of their most recent strategic plan. This occurred from September 2021 to December 2021 at a discounted cost of \$26,180. The scope of work included organizational assessment, community focus groups, partner meetings, board phone interviews, strategic planning retreat facilitation, follow-up committee meetings, and drafting of the final strategic plan. Sarah Brinkmann is the Executive Director and can be reached by email at sarahb@nwhomestart.org or by phone at (815) 962-2011.

Center for Fair Housing Center

Center of Fair Housing, located at 602 Bel Air Blvd., Mobile, AL 36606, is a nonprofit community resource dedicated to eliminating housing discrimination. Kristina Musante was the consultant and facilitator for their most recent strategic plan. This occurred in the Summer of 2020 and was funded by JP Morgan at \$30,000. The scope of work included board primer training, board phone interviews, strategic planning retreat facilitation, follow-up committee

meetings, and drafting of the final strategic plan. Teresa Fox Bettis is the Executive Director and can be reached by email at tfbettis@sacfh.org or by phone at (251) 554-3378.

Dedication of Time

K&J Strategic Solutions Partners Kristina Musante and Joshua Biehler have the time, energy, and passion for supporting the Ad Hoc Housing Diversity Study Committee. In the Cost Section, K&J laid out two different costs, depending on the amount of travel for in-person vs virtual meetings. The consultants are willing and dedicated the time to travel every month, from Washington DC to the Town of Cape Elizabeth to attend each meeting in-person. Depending on the committee's plan of action, each partner plans to dedicate 12-15 hours a month, totaling 24-30 hours a month, to the Ad Hoc Housing Diversity Study Committee. As such, K&J realizes there may be some months where more work is expected, such as writing the final report and any major status reports. We believe housing diversity is a key to a healthy community and will dedicate as much, within reason, to this committee.

Similar Work

The partners at K&J Strategic Solutions have decades worth of experience supporting committees and coalitions that wish to create access to opportunities to their low-income and minority residents. The following are some examples of coalition or committee management projects on the local, state, and national level.

1. Kristina Musante and Joshua Biehler directed the National Community Reinvestment Act Coalition's National Training Academy. As part of their work, they helped train and organize locally-based nonprofits to form coalitions with local governments to compel bank investment and grant-support in their low-income communities. We organized and supported thousands of meetings and trainings for hundreds of local coalitions. We

worked in hundreds of communities across the country to help garner over \$150 billion in Community Benefits Agreements (CBA) and support for low-income communities from banks.

For more information on CBA's: <https://ncrc.org/tag/cba/>

2. Kristina Musante was the founding director for the Wyoming Covering Kids Coalition from 1999 to 2001, which included management of seven local coalitions, one state coalition, and support of a national coalition. The Wyoming Covering Kids project was recognized as a national model by HHS, Southern Poverty Law Center, and RWJ Foundation for creating best practices and successfully linking tens of thousands of low-income families to public health insurance and drastically improving their lives and health.

http://www.coveringkidsandfamilies.org/projects/index_StateID=WY.php

3. Kristina Musante and Joshua Biehler, have supported Fair Housing Coalitions and Analysis of Impediment development and equitable fair housing planning across the country. Kristina and Joshua worked closely with the City of Jackson, Birmingham Alabama, and Mobile, Alabama to develop fair housing coalitions that create fair housing plans that address inequities and create opportunities for protected classes and low-income communities from 2017 to 2018.

For the latest Analysis of Impediments from Birmingham that later partially derived from our organizing work in the city: https://www.birminghamal.gov/wp-content/uploads/2020/05/Analysis-of-Impediments_Final.pdf

4. Kristina Musante supported Fair Housing Coalition and Analysis of Impediments development and equitable fair housing planning for Osceola County Florida. Kristina and her colleagues at CLSMF worked to develop and train a local fair housing coalition

that creates an AFFH-complaint fair housing plan that address inequities and create opportunities for protected classes and low-income communities from 2014 to 2015.

https://www.osceola.org/core/fileparse.php/2525/urlt/011321_HOME-Consortium-Analysis-of-Impediments-November2020.pdf

Cost of Proposal

At K&J Strategic Solutions, we believe in helping communities, nonprofits, and their residents prosper and thrive. We understand that funding is scarce and valuable, so we want to ensure we are able to provide the best support for the committee and the Town of Cape Elizabeth. K&J knows the value of in-person meetings such as these. K&J Strategic Solutions is located in the Washington, DC area, but as stated in the Dedicated Time Section, the consultants are willing to travel monthly to Town of Cape Elizabeth to participate fully in the committee meetings.

K&J has designed two separate cost proposals based on the amount of travel the committee feels is necessary. We are willing to work with the committee on how many times in-person versus virtual meetings will be sufficient. If only travel for the kick-off meeting and final report meeting are deemed necessary, K&J is willing to dedicate more time to the committee, as such the travel costs would not be necessary. The two proposal costs, but include travel options, in which case K&J used current GSA travel fees in figuring out the overall cost of the project. The one main, definitive cost is K&J Strategic Solutions partners' Kristina Musante and Joshua Biehler's billable hourly rate which is \$100/hour per partner.

Cost Proposal 1:

In this first cost proposal, the total budget amount is \$43,143. This budget, as seen below, is based on traveling for fourteen meetings (for fourteen months) in-person to Cape Elizabeth and includes each partner dedicating eleven hours of work outside of travel to the committee. As mentioned above, we used the GSA schedule for travel (https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-results/?action=perdiems_report&state=ME&fiscal_year=2022&zip=&city=portland) and the

billable hourly rate of \$100/hour per partner. The monthly billable hourly cost is \$1,100 per partner totaling \$2,200 a month. The total billable cost for the contract is \$15,400 per partner, totaling \$30,800. The travel costs vary over the course of the year, dependent on the month, but averages to \$880/month.

You can see the breakdown of costs below:

Fee	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep
Est. Airfare	\$250	\$250	\$250	\$250	\$225	\$225	\$225	\$225	\$225	\$250	\$250	\$250	\$250	\$250
Est. Airfare	\$250	\$250	\$250	\$250	\$225	\$225	\$225	\$225	\$225	\$250	\$250	\$250	\$250	\$250
Est. Lodging	\$176	\$149	\$149	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$110	\$176	\$176	\$149
½ Day Meal (x4)	\$192	\$192	\$192	\$192	\$192	\$192	\$192	\$192	\$192	\$192	\$192	\$192	\$192	\$192
Est. Rideshare	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75
Total Cost Travel	\$943	\$916	\$916	\$877	\$827	\$827	\$827	\$827	\$827	\$877	\$877	\$943	\$943	\$916

Total Estimated Travel Cost for K&J to travel monthly: \$12,343

Person	Hours Per Month	Billable Rate	Billable Monthly Rate	Number of Meetings	Total Billable Rate
Kristina Musante	11	\$100	\$1,100	14	\$15,400
Joshua Biehler	11	\$100	\$1,100	14	\$15,400
Total Billable Hours	22	\$100	\$2,200	14	\$30,800

Total Billable Hours for K&J: \$30,800

Total Project Cost: \$12,343 (Travel) plus \$30,800 (Billable) equals \$43,143

Cost Proposal 2:

In this second cost proposal, the total budget amount is \$42,560. This budget, as seen below, is based on traveling for seven meetings (for fourteen months) in-person to Cape Elizabeth and includes each partner dedicating eleven hours of work the months the consultants travel and fifteen hours the months they meet with the committee virtually. As mentioned above, we used the GSA schedule for travel (https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-results/?action=perdiems_report&state=ME&fiscal_year=2022&zip=&city=portland) and the billable hourly rate of \$100/hour per partner. The monthly billable hourly cost the months the consultants travel is same as Cost proposal one, which is \$1,100 per partner totaling \$2,200 a month. The months the consultants meet virtually the monthly billable hours is \$1,500 per partner totaling \$3,000 a month. The total billable cost for the contract is \$18,200 per partner, totaling \$36,400. The travel costs vary over the course of the year, dependent on the month, but averages to \$440/month.

You can see the breakdown of costs below:

Fee	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep
Est. Airfare	\$250	\$0	\$250	\$0	\$225	\$0	\$225	\$0	\$225	\$0	\$250	\$0	\$250	\$0
Est. Airfare	\$250	\$0	\$250	\$0	\$225	\$0	\$225	\$0	\$225	\$0	\$250	\$0	\$250	\$0
Est. Lodging	\$176	\$0	\$149	\$0	\$110	\$0	\$110	\$0	\$110	\$0	\$110	\$0	\$176	\$0
½ Day Meal (x4)	\$192	\$0	\$192	\$0	\$192	\$0	\$192	\$0	\$192	\$0	\$192	\$0	\$192	\$0
Est. Rideshare	\$75	\$0	\$75	\$0	\$75	\$0	\$75	\$0	\$75	\$0	\$75	\$0	\$75	\$0
Total Cost Travel	\$943	\$0	\$916	\$0	\$827	\$0	\$827	\$0	\$827	\$0	\$877	\$0	\$943	\$0

Total Estimated Travel Cost for K&J to travel monthly: \$6,160

Person	Hours Per Month Traveling	Billable Rate	Billable Monthly Rate Traveling	Number of Meetings	Total Billable Rate
Kristina Musante	11	\$100	\$1,100	7	\$7,700
Joshua Biehler	11	\$100	\$1,100	7	\$7,700
Total Billable Hours	22	\$100	\$2,200	7	\$15,400

Person	Hours Per Month Not Traveling	Billable Rate	Billable Monthly Rate Not Traveling	Number of Meetings	Total Billable Rate
Kristina Musante	15	\$100	\$1,500	7	\$10,500
Joshua Biehler	15	\$100	\$1,500	7	\$10,500
Total Billable Hours	30	\$100	\$3,000	7	\$21,000

Total Billable Hours for K&J: \$36,400

Total Project Cost: \$6,160 (Travel) plus \$36,400 (Billable) equals \$42,560

K&J Strategic Solutions is willing to accommodate the travel schedule with as much or as little is needed. We are willing to also work with the committee and the Town of Cape Elizabeth on the number of hours as well. This is just an estimate of time, knowing the amount of pre and post work of committee meetings.

Additional Meetings

K&J Strategic Solutions is willing to continue to meet with the committee and assist the Town of Cape Elizabeth after the contract ends if needed. If additional meetings are needed, the cost would depend on if the consultants must travel, which averages \$850/month. K&J Strategic Solutions is willing to lower the cost of their hourly rate to \$75/hour per partner if there is the need for additional meetings, up to 15 hours per partner, which is \$1,125 per partner or \$2,250 total. After the 15 hours, the rate would resume to \$100/hour per partner.

Appendix A – CV & Resume

Kristina Musante, JD

KristinaMusanteJD@gmail.com
407.925.7786

Education

Juris Doctorate

Florida A&M College of Law

Focus Group Research Facilitation Certification

University of South Florida

Bachelor of Arts Legal Studies & Minor in Criminal Justice

University of Central Florida

Specialized Skills

- Expert in non-profit organizational assessment, strategic planning, and fundraising.
- Non-profit professional and expert in the Community Reinvestment Act, HMDA, Fair Housing Act, and equitable community development. Assisted in securing over \$150 billion in funding and investments for low-income, segregated communities from banks under the Community Reinvestment Act (CRA).
- Skilled community organizer and campaign director that trains and coaches over 5,000 people and organizations a year on strategic planning, fundraising, cross-party advocacy, community organizing, relationship building, criminal justice reform, the history of segregation, the Fair Housing Act, and Community Reinvestment Act.
- Over 15 years' experience in securing and managing complex federal grants to include HUD, DOJ, HHS, DOE, as well as local, and private grants, contracts, gifts, and matching funds of over \$9 million per year.
- Skilled low-income housing and equitable community development consultant and advocate.
- Federal taxation policy reform advocate and assistant on the Western New England Law Review article called the EXPLODING WEALTH INEQUALITIES: DOES TAX POLICY PROMOTE SOCIAL JUSTICE OR SOCIAL INJUSTICE?
- Data-driven non-profit leader and co-creator of Children's Functional Assessment Rating Scale (CFARS) an assessment tool used to improve mental health care and eliminate corruption in the community mental health system.

Experience

2020-present **K&J Strategic Solutions LLC**
Non-Profit Consultant and Partner

- Serve as a strategic collaborator and consultant for nonprofits, advocates, and communities that wish to increase capacity, improve organizational development, and achieve advocacy and fundraising goals.
- Provide assessments, capacity building training, strategic planning, focus group research, and fundraising services to nonprofits primarily working in housing and equitable community development.

2015-20 **National Community Reinvestment Coalition (NCRC)** <https://ncrc.org/>
Director of the National Training Academy

- Using data-driven strategies to include HMDA analysis, assisted with securing over \$150 billion in funding and investments for low-income, segregated communities from a handful of banks by organizing local groups and coalitions to hold banks accountable to their obligation under the Community Reinvestment Act.
- Directed a national training academy that serves over 5,000 advocates, lawyers, bankers, government officials, and housing professionals annually. Led a team of 12 staff and instructors providing comprehensive training and consulting on evaluation-based, data-driven equitable community development, criminal justice reform, housing counseling, and civil rights reform strategies to promote access to opportunity for low-income people in the country.
- Grew the annual budget from \$700,000 annually to over \$2,500,000 annually in three years through data-driven training, programming, and effective fundraising. Included a diverse source of federal, state, local, and private funding sources.
- Ability to communicate complicated concepts to any audience. Serves as a popular trainer and speaker on topics of equity, law, inclusion, non-profit capacity building, and social justice reform throughout the country. The average score given by training/conference participants is 4.98 out of 5.0.
- Served as an advocate in U.S. Congress, in state houses, and local jurisdictions throughout the United States for laws and regulations that create and facilitate affordable housing, living wages, equitable community development, public and private investment in poor communities, and general access to opportunity for low-income people.
- Host Capitol Hill Day (Lobbying Day) with over 400 NCRC members from across the country annually, and personally lobby Congress and all levels of state and local government regularly throughout the year.
- Host over 1,000 advocates from across the nation at the NCRC Just Economy annually and present at workshops.
<https://ncrc.org/conference/>

- Lead Presenter at “*Rewriting the AFFH Rule*” Workshop at the NCRC 28th Annual Just Economy Conference in March 2019, in Washington D.C.

2015

**American Civil Liberties Union of Florida (ACLU) <https://www.aclufl.org/>
*Justice 4 Jacksonville Campaign Director***

- Directed an Open Society Foundation-funded campaign to reduce the use of the death penalty in North Florida that resulted in a 75% reduction in executions and a 10-month moratorium on executions, as we litigated the constitutionality of Florida’s death penalty sentencing law and generated public support to abolish the death penalty.
- Recruited, trained and managed a local coalition of diverse partners from all sides of the political spectrum (to include the Catholic Church, Young Republicans, victims’ families, law enforcement, Young Democrats, etc.) working to reduce the over-use of the death penalty in the notorious Duval County, Florida. The coalition works in committees to influence policy, media, state attorney decisions, and educate the community and law makers about the costs associated with the death penalty.
- Using data-driven and well researched arguments against the use of the death penalty the Justice 4 Jacksonville community coalition was developed and worked to elect a new State Attorney with a more humane vision for Northeast Florida. Death sentences are no longer sought under the new State Attorney in Northeast Florida.
- Extensive work with local, state, national, and international officials, law makers, and advocates to create human rights reforms and end the use of the death penalty. As a result of our advocacy and legal work Florida was forced to revise the state’s death penalty sentencing law to include a unanimous jury decision.

2014

**Community Legal Services of Mid-Florida (CLSMF) <https://clsmf.org/>
*Housing Advocate & Training Specialist***

- Developed and facilitated weekly trainings center-around the Federal Fair Housing Act, Community Reinvestment Act, ADA, and federal anti-discrimination lending laws to groups as small as 2 and as large as 400.
- Assisted over 10 communities in organizing and planning in a way that promotes integration and uses the Affirmatively Furthering Fair Housing rule and litigating fair housing claims.
- Plan, manage and facilitate the annual Florida Fair Housing Summit for over 400 participants with statewide partners and nationally renowned speakers and trainers. Assists litigation preparation, testing, and complaint filing, as well as grant writing and fundraising efforts which results in full funding annually.

- 2014** **Moss, Krusick, & Associates CPA Firm** <https://www.mosskrusick.com/>
Tax Associate
- Researched and prepared federal gift, trust, and individual tax returns, as well as, assisted with proposal development and marketing efforts.
- 2013** **Law Office of Dennis Salvagio, Esquire**
<https://www.facebook.com/Salvagiolaw/>
Criminal Defense Law Clerk
- Led research, investigation and writing teams and assisted with preparation for and sat second chair in hearings, negotiations, depositions, and jury selections with incredibly successful results for our clients.
- 2010** **Kids House Child Advocacy Center** <https://www.kidshouse.org/>
Grants & Contract Director
- Served on the management team of one of the finest children’s advocacy centers in the country.
 - Secured and managed over \$2 million in funding annually and worked directly with the Board of Directors to raise money and further the mission and protect children. Increased grant funding by \$700,000 within the first year of joining Kids House as grants director.
- 2007** **International Academy of Design and Technology (IADT)**
<http://www.iadt.edu/orlando/about-iadt-orlando>
Presenter & Events Coordinator
- Presented and provided workshops daily to high school students, community members, and civic groups of all sizes.
 - Managed and planned multiple large events for the college for thousands of potential students annually,
- 2004** **Musante Development Solutions**
Fundraising & Board Development Consultant
- Instrumental consulting work in successfully moving Florida’s foster care system from a public model to a locally- focused and private, non-profit model with exceptional results in adoptions, increased levels education, well-being, income and health for local foster children.
 - As a result of reforms foster children in Central Florida increased high school graduation rates from 25% to 59%, college graduation rates from 3% to 13%, and adoption rates increased for all children in the system See more outcomes here: <http://embracefamilies.org/wp-content/uploads/2019/01/CBC-BK01-Report-to-Community-Proof-4-Copy.pdf>
 - Assisted non-profits with raising over \$1 million annually through board development, board training, fund raising events, fund raising campaigns, strategic planning, and grant writing.

- 2002** **Children’s Home Society of Florida** <https://www.chsfl.org/>
Development Director
- Tripled fundraising results in nine months, raising \$3 million annually through strategic planning and board development that increased donor gifts, and improved events, grants and contracts.
 - Increased donor base by 50% and secured grant funding through board development and training, strategic events, media, and long term giving plans.
- 1999** **Wyoming Department of Health**
<https://health.wyo.gov/healthcarefin/chip/>
Wyoming Covering Kids Director
- This award-winning project, funded by the Robert Wood Johnson Foundation, recognized by the US Health and Human Services, assisted with the roll out of State Children’s Health Insurance Program in Wyoming by supporting efforts with streamlined entry and improved marketing of public health insurance programs.
 - Secured an additional \$9 million dollars in federal matching funds for the \$1 million project. Made grants to and oversaw seven local projects and coalitions, as well as the state coalition.
 - This award-winning project extended health care and insurance to nearly every uninsured child in Wyoming through the creation and work of local and state coalition.
 - This national project was funded by the Robert Wood Johnson Foundation and led by the Southern Poverty Law Center.
http://www.coveringkidsandfamilies.org/projects/index_StateID=WY.php
- 1999** **Florida Department of Children & Families District 7 ADM**
<http://myflfamilies.com/>
Juvenile Justice Liaison & Orange County Juvenile Drug Court Coordinator
- Directed the Orange County Juvenile Drug Court that was recognized as a national model program by US Department of Justice because of the low recidivism rate and community engagement in helping youth to recover.
- 1996** **University of South Florida Louis de la Parte Florida Mental Health Institute**
<https://www.usf.edu/cbcs/fmhi/>
District 7 ADM & Eli Lilly Research Assistant
- Co-creator of the CFARS a functional assessment tool developed to measure the treatment success of children with mental illness and used in making informed contract decisions with local mental health care providers.
<http://outcomes.fmhi.usf.edu/cfars.cfm>

- Served on the Schizophrenia Care and Assessment Project (SCAP) research team which aimed to identify factors that improved the lives of those living with schizophrenia and included bi-annual interviews and medical record analysis
<http://serp.mc.duke.edu/SCAPPRO.htm>

Published Law Review Article and Assessment Research Tool

- 2014 Research Assistant to Phyllis Taite, JD, LL.M. researching federal taxation policy resulting in this published in Western New England Law Review Volume 36 Issue 3 36 (2014), EXPLODING WEALTH INEQUALITIES: DOES TAX POLICY PROMOTE SOCIAL JUSTICE OR SOCIAL INJUSTICE?
<https://digitalcommons.law.wne.edu/cgi/viewcontent.cgi?referer=&httpsredir=1&article=1722&context=lawreview>
- 1996 Co-creator of the CFARS a functional assessment tool developed to measure the treatment success of children with mental illness and used in making informed contract decisions with local mental health care providers.
<https://www.usf.edu/cbcs/mhlp/training/functional-assessment-rating-scales.aspx>

Speeches, Trainings, & Writings

- 2020 NCRC Blog: **HUD's Proposed AFFH Rule Would Set Back Years of Progress.**
<https://ncrc.org/huds-proposed-affh-rule-would-set-back-years-of-progress/>
- 2020 "Community Reinvestment Act for Bankers" Training, January 2020, Miami, Florida
- 2020 *Strategic Planning, Fundraising, and Advocacy* virtual and in-person for NCRC members and local advocates. February-September 2020
- 2019 *Strategic Planning, Fundraising, Grant writing, Advocacy, and Fund Diversification* training creator and facilitator for Miami, Baltimore, and Cincinnati non-profits.
- 2019 "AFFH and the Assessment of Fair Housing Process" Training Facilitator for HUD Housing Counselors and community advocates in Atlanta, Georgia.
- 2019 "Community Reinvestment Act for Bankers Training" NCRC Training Center, February 2019, Washington D.C.
- 2019 NCRC 27th Annual Just Conference on Economic Justice, "Rewriting the *Affirmatively Furthering Fair Housing Rule*" Presenter March 2019, Washington, DC.
- 2018 "The state of housing counseling ten year after the housing crash," New York City Housing Conference, New York, New York.
- 2018 Non-Profit Capacity Build Training Series instructor: 1-day training sessions on "Board Development and Fundraising" in the cities of Seattle, Portland, Orlando, Tampa, Dayton, and Akron.
- 2018 Non-Profit Capacity Build Training Series instructor: 1-day training sessions on "Financial Management" in the cities of Seattle, Portland, Orlando, Tampa, Dayton, and Akron.
- 2018 NCRC 27th Annual Just Conference on Economic Justice, "Combining *Affirmatively Furthering Fair Housing rule with bank investment obligation in low income communities Workshop*" Presenter April 2018, Washington DC
- 2017 NCRC 26th Annual Conference on Economic Justice, "Combining the *Community reinvestment Act with the Affirmatively Furthering Fair Housing Rule Workshop*" Presenter March 2017, Washington DC


- 2017 “Criminal Justice Reform and Fair Housing,” Pennsylvania Human Rights Commission Annual Fair Housing Conference, Harrisburg, PA, August 2017.
- 2017 “Using Data, Community Reinvestment Act, ADA, and Fair Housing Act to Create Diverse, Beloved Communities” NCRC’s National Conference, Washington DC, March 2017.
- 2017 “Using Data, Community Reinvestment Act, ADA, and Fair Housing Act to Create Diverse, Beloved Communities” PCGR Conference, Pittsburgh, Pennsylvania
- 2017 “Using Data, Community Reinvestment Act, ADA, and Fair Housing Act to Reform Criminal Justice” Fair Housing Summit, Philadelphia, Pennsylvania
- 2017 “Using the Community Reinvestment Act and Fair Housing Act to Create Economic and Social Justice” PCRI Board Development Training, Portland, Oregon
- 2016 Affirmatively Furthering Fair Housing National Policy Development Committee Member
- 2016 “Using the Assessment of Fair Housing and the Community Reinvestment Act to Create Meaningful Reforms” Training Co-Facilitator for government officials and community advocates in Cleveland, Ohio, Buffalo, New York, New Orleans, Louisiana, Washington DC, and Orlando, Florida.
- 2016 “AFFH and the Assessment of Fair Housing Process” Training Facilitator for HUD Housing Counselors and community advocates in Cleveland, Ohio, Buffalo, New York, New Orleans, Louisiana, Washington DC, and Orlando, Florida.
- 2016 Key Note Speaker on AFFH for Mississippi Fair Housing Summit, Jackson, Mississippi, April 2016, “Getting to the Promise Land Using AFFH and the Assessment of Fair Housing Process.”
- 2016 AFFH featured speaker at the Fair Housing Summit for Delaware in Wilmington, Delaware, April 2016, “Getting to the Promise Land Using AFFH and the Assessment of Fair Housing Process.”
- 2016 NCRC 25th Annual Conference on Economic Justice, “Affirmatively Furthering Fair Housing” Two Day Class Trainer for HUD Housing Counselors and housing professionals, March 15-17, 2016
- 2016 NCRC 25th Annual Conference on Economic Justice, “Affirmatively Furthering Fair Housing Workshop” Presenter and led the AFFH Strategic Planning Session, March 2016, Washington DC
- 2015 Authored the “Assessment of Fair Housing Community Planning Guide” which creates a structure for meaningful community engagement and CRA investment in the AFH planning process.
- 2015 Florida Fair Housing Summit “Affirmatively Furthering Fair Housing” Training with Jeffrey May, Orlando Florida, April 2015
- 2015 <http://www.justice4jacksonville.org/why-are-we-wasting-taxpayer-money-on-death-cases-that-the-supreme-court-is-probably-going-to-overturn/>
- <http://www.justice4jacksonville.org/in-the-face-of-botched-executions-and-opposition-from-conservatives-governor-rick-scott-and-attorney-general-pam-bondi-push-to-resume-executions-in-florida/>
- <http://www.justice4jacksonville.org/the-us-supreme-court-to-rule-this-month-on-if-floridas-lethal-injection-execution-process-is-cruel-and-unusual-punishment/>
- <http://www.orlandoweekly.com/Blogs/archives/2015/01/15/death-becomes-no-one-latest-scheduled-florida-execution-raises-questions>


Other Awards and Accomplishments _____

- 2001 One of 19 people in the USA chosen for US Health Human Services Award for success in creating access to health care for low-income children
- 1999 US Department of Justice Mentor Award for Orange County Juvenile Drug Court
- 1998 Governor's Award for Excellence and Innovation in Government for CFARS and other research and outcome driven projects.

JOSHUA BIEHLER

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AREAS OF EXPERTISE

OPERATIONAL MANAGEMENT

WORKFORCE DEVELOPMENT

TRAINING & EDUCATION

ADULT LEARNING THEORY

STRATEGIC PLANNING

CURRICULUM DEVELOPMENT

TEAM LEADERSHIP

PROCESS IMPROVEMENTS

NEEDS ANALYSIS

PROGRAM MANAGEMENT

EDUCATION

**MA, ORGANIZATIONAL
DEVELOPMENT & CHANGE**
Pennsylvania State University
2017

BA, ART HISTORY; ENGLISH
George Mason University
2011

CERTIFICATES

LEADERSHIP DEVELOPMENT
2016, cum laude

RETAIL MANAGEMENT
2015, magna cum laude

SUMMARY

An established, results-driven professional with experience contributing to the design, development, and implementation of innovative growth-focused training programs and initiatives that support workforce development, operational performance, and profitability

Detail-oriented, adaptable, and analytical-minded with a reputation for facilitating change based on the needs of diverse populations, seamlessly delivering sustainable solutions geared towards planning, engagement, training, and management

PROFESSIONAL EXPERIENCE

K&J Strategic Solutions, LLC | Arlington, VA | May 2021 - present

MANAGING PARTNER

- Facilitates training for nonprofits on board development, role establishment, member governance, fundraising strategies, and capacity building—conducting focus groups and partner/funder meetings to help organizations identify ways to serve their communities
- Runs ongoing assessments of organizational frameworks and performance, leveraging findings to inform decision making
- Proactively and pragmatically manages all company finances, digital engagement, and outreach initiatives—employing notable business acumen to ensure the effective management of operational processes

National Community Reinvestment Coalition | Washington, DC | Apr 2018 - May 2021

TRAINING COORDINATOR

- Developed targeted learning plans based on identified capabilities and productivity goals, designing and presenting virtual training sessions, co-leading in-person courses, and organizing a retreat focused on strategic planning that garnered praise from participants
- Co-authored two Notice of Funding Availability (NOFA) Housing Counseling Training Grants, receiving the highest award in the history of the organization and demonstrating an ability to proactively fundraise by expanding and diversifying funding through local and state private organizations
- Provided recommendations for improving training practices, resource management, and performance in alignment with development objectives—introducing a new marketing and engagement strategy that increased training participation levels by 10% annually
- Identified strengths and discrepancies in programming, introducing continuous improvements and overseeing the build-out of future adult learning and training initiatives based on needs assessments, research, and performance-related data analysis
- Coordinated and managed planning, scheduling, and logistics for training retreats, and in-person sessions—handling vendor invoices and travel reimbursements for participants
- Established and maintained multiple performance, attendance, and budget tracking reports, ensuring 100% accuracy for registration logs and evaluation documentation
- Drafted contracts for and assisted in managing subject matter experts (SMEs) and trainers, providing further leadership to temporary staff to ensure operational efficiency, streamlined workflows, and compliant with organizational standards

Signature Theatre | Arlington, VA | Sep 2015 - Oct 2016

HOUSE MANAGER

- Directed the implementation of strategies and solutions that optimized daily processes, maximized productivity, and enhanced time management in a fast-paced environment
- Demonstrated an ability to adapt to constantly changing circumstances, addressing event-related issues and offering solutions that resulted in minimal disruptions
- Facilitated volunteer training, building rapport rooted in trust and communication, effectively delegating tasks and promoting a highly organized approach to operations in a collaborative, dynamic workspace

JOSHUA BIEHLER

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PROFESSIONAL EXPERIENCE (CONT'D)

The Library of Congress | Washington, DC | Apr 2014 - Aug 2017

WORKFORCE DEVELOPMENT PROGRAM DETAIL (FEB 2016 - APR 2016)

- Collaborated with subject matter experts to identify needs based on performance metrics in support of workforce development, retention, and quality control
- Crafted templates for and developed lesson plans that included digital media, quizzes, lectures, presentations, and hands-on learning activities—researching best practices for maximizing usability and accessibility for users and instructors
- Produced a train-the-trainer module for instructors, overseeing the design of all materials including audio, video, graphics, and written content—seamlessly incorporating all elements into the final product for a cohesive user interface

SALES ASSOCIATE (APR 2014 - AUG 2017)

- Demonstrated knowledge of product and service offerings, employing strong communication and leadership skills to deliver clear and concise directives to staff and make sound recommendations to guests
- Sought out new vendors and contributed to the development of new products that increased annual revenue by 3%
- Maintained inventory and organized stockroom to ensure availability of products, fulfilling orders with 100% accuracy, increasing revenue by 30% since launching website sales in 2016, and reducing inventory level shrinkage by 90%
- Designed and introduced a shop manual that outlined standard operating procedures (SOPs)

The Phillips Collection | Washington, DC | Jul 2012 - Apr 2014

SHOP SUPERVISOR

- Served as a point of contact for customers, tasked with delivering information related to product and service offerings
- Worked with cross-functional departments to foster a more cohesive environment, introduce new procedures for streamlining member enrollment, and improving overall service functions
- Established a reputation for being a self-starter with the ability to mitigate challenges in an unpredictable, dynamic, service-focused environment

The Disney Store | McLean, VA | Jun 2008 - Jan 2012

LEAD MANAGER

- Led a team of 30, maintaining a positive workplace and collaborative work ethic amongst the team, ensuring floor operations ran smoothly throughout the entire shift
- Selected by the district manager to open and facilitate training, workforce development, and employee relations for a new store—to deliver instruction that increased operational efficiency and fostered a commitment to excellence while simultaneously managing home store operations
- Identified behaviors responsible for less than optimal output, shifting a fragmented, robotic enterprise culture towards a service-centric approach
- Managed customer inquiries and concerns, employing problem-solving and communication skills to offer reasonable solutions that ensured satisfaction

VOLUNTEER EXPERIENCE

Association of Talent Development (ATD)

CONSULTANT/VOLUNTEER

- Oversaw content creation and analysis of an annual member survey on behalf of the President-Elect
- Consulted on the layout, development, and content of the sponsorship/partnership page of the website for the local Chapter for the Association

TECHNICAL SKILLS

TOOLS: Google Docs; netFORUM Pro; Insightly; Mailchimp; Adobe; Adobe Connect; Zoom; SurveyMonkey, QuickBooks; SquareSpace

SOFTWARE: Microsoft Office Suite; Microsoft Project; Adobe Creative Cloud: Lightroom

SOCIAL MEDIA PLATFORMS: Facebook; Twitter; LinkedIn