

State of Nebraska Department of Labor Request for Call Center Support for Unemployment Insurance Services

Broadening the Community Access and Resource Education (CARE) Center to Support the NDOL UI
Call Center Services

Response to RFP 121962 O3

Due Date: June 27, 2pm CST



Public
Support
Ventures

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1. Corporate Overview

a. Bidder Identification and Information

Public Support Ventures, LLC (PSV) is a subsidiary corporation of The Community Firm, a Colorado-based 501C3, headquartered at 1600 N Downing St, Denver, Colorado, with significant corporate experience and management abilities. The Community Firm and its subsidiary PSV operate contact centers for state and local government through a brand called the Community Access and Resource Education Center (CARE Center, [CARECenter.us](https://www.carecenter.us)). The Community Firm also operated under trade names (Community Economic Defense Project, Colorado Stability Fund, CEDP, COVID-19 Eviction Defense Project).

NDOL is seeking a call center partner who can meet a specific and high-stakes set of needs: rapid response to time-sensitive Unemployment Insurance (UI) inquiries, multilingual service delivery, and measurable improvements to accessibility and resolution rates. With over 70,000 inbound calls projected annually—many from residents navigating stressful economic transitions—NDOL requires a vendor that brings proven operational readiness, empathy-centered service, and KPI-driven performance management.

The CARE Center was built to meet these challenges at scale. We manage call centers with live phone support, script-based triage, and structured escalation pathways for a variety of programs. Our model emphasizes single-contact resolution, multilingual access (including live Spanish-speaking agents and 100+ languages via interpretation), and active QA oversight—all directly in line with NDOL's expectations. Further, we have direct experience with Unemployment Insurance systems through our dozens of case managers, managing comparable tech systems including tickets and applications, successfully managing escalations and complexity. Our Nebraska-rooted leadership and experience delivering live agent services for complex government benefit programs across more than 400,000 contacts per year make us uniquely prepared to partner with NDOL.

Our CARE Center was recognized by the Colorado Governor's Operations Cabinet as best-practice for its low hold times and strong user feedback, and is grounded in four key principles:

- (1) Community: Tailoring support to each person's needs and preferred communication method—primarily voice, with supplementary options for chat, text, or email.
- (2) Access: Maintaining reliable availability and multilingual support, with real-time responsiveness and issue tracking.
- (3) Resource: Prioritizing one-contact resolution and clear pathways to escalation, minimizing transfers and rework, especially for live calls.
- (4) Education: Equipping residents with straightforward information and self-help tools to reduce call frequency and enhance trust.

Below is a summary of PSV's legal and organization information, submitted in accordance with Section VI.A.1 of the RFP:

- Legal name: Public Support Ventures, LLC
- Subsidiary of: The Community Firm
- Address: 1600 N Downing St., Suite 200, Denver CO 80218
- Telephone: (720) 780-5671
- Email: info@carecenter.us
- Federal tax ID: 83-0953543
- State of incorporation: Colorado
- Nonprofit status: 501(c)(3)

We understand you have many options for call center services, and we want to highlight our deep connections to Nebraska. Our CARE Center leader Kirby Rising, a Nebraska native is proud to be leading our call-center bid. CEDP is a regional organization with staff in Colorado, Nebraska, and New Mexico. We are proud to have staff from and based in Nebraska, ensuring a deep understanding of the local community.. As a Nebraska native with family still residing in Seward and Sutherland, Kirby, for example, brings a deep appreciation for the values and work ethic of Nebraskans, along with a strong commitment to delivering high-quality, timely support to the state's residents. An attendee of Concordia University Seward and graduate of Chadron State College, Kirby's Nebraska upbringing has shaped his dedication to public service and his commitment to ensuring a seamless and respectful experience for all residents.

b. Financial Statements

We have attached audited financial statements for the Community Firm from 2022 and 2023. The 2024 financial audit is ongoing and statements can be provided upon completion. Public Support Ventures, LLC was formed in 2025.

c. Change of Ownership

No change in ownership or control of PSV is anticipated during the twelve months following the solicitation response due date.

d. Office Location

Should PSV be awarded the contract with the State of Nebraska, call center operations could be provided at 1600 N Downing St 6th Floor, Denver, CO 80218, with significant leadership provided by our Nebraska-based team members. We are also willing to rent and outfit an office for our call center operations in Nebraska if awarded.

e. State Contract History

Neither PSV nor any other parties named in PSV's solicitation response have had any contracts with the State of Nebraska over the previous 5 years.

f. Employee Relationship Disclosure

Neither employees of PSV nor any other parties named in PSV's solicitation response have been employed by the State of Nebraska over the previous 5 years.

g. Contract Performance Disclosure

PSV has not had any contracts terminated for default, convenience, non-performance, non-allocation of funds, or any other reason in the past 5 years.

h. Summary of Recent Corporate Experience

Project Name / Client	Type of Program	Contract Term	Volume	Outcomes & KPIs	Contact Reference
ERAP / CERA – CO Dept. of Local Affairs	Emergency Rental Assistance	3 years (ongoing)	Calls: 100,000-400,000 / year Agents: 10.5	50% reduction in hold & talk times 88% CSAT 5,000 + warm transfers	Maria Stein – Program Manager at the State of Colorado Department of Local Affairs, (585) 953-7573, maria.stein@state.co.us
EMAP – CO Dept. of Local Affairs	Emergency Mortgage Assistance	3 years (ongoing)	Calls: 9,000/ year Agents: 4		
Marshall Fire Rebuild – CO Dept. of Local Affairs	Disaster Recovery / Grant Support	1 year	Calls: 14,000 / year Agents: 4	14-day launch timeline 562 HHs supported \$4.6M disbursed	Tim Katers - Financial Assistance Manager at the State of Colorado Department of Local Affairs, (303) 863-7756, tim.katers@state.co.us
TRUA – City of Denver	Rental & Utility Assistance	2 years (ongoing)	Calls: 27,000 / year Agents: 4.5	30% reduction in time to resolution Accurate court doc triage Multi-channel success	Melissa Thate - Director of Housing Stability at the City of Denver, (720) 913-1702, melissa.thate@denvergov.org

Summary of experience:

NDOL has articulated a clear set of priorities for this call center partnership: reduce claimant frustration

through timely and accurate support, maintain key performance indicators (ASA, AHT, CSAT), ensure equitable language access, and limit unnecessary transfers through effective triage. Public Support Ventures has met these same challenges across multiple government programs—supporting more than 400,000 resident interactions through call centers serving renters, displaced households, and benefit applicants. The three examples below demonstrate our ability to launch high-volume, multilingual call centers with measurable success and strong alignment to NDOL’s service expectations.

(a) Contact Center for renters facing displacement through CO Division of Housing

This case study demonstrates the CARE Center’s ability to operate a high-volume, SLA-driven, multi-channel contact center with urgency, adaptability, and performance discipline – directly aligning with the Nebraska Department of Labor’s goals for a responsive, metrics-driven UI call center.

Project and Objective: In 2022, as eviction rates and demand for emergency assistance dramatically increased in Colorado and the state’s existing provider was failing to meet the need, PSV launched the CARE Center. The CARE Center had several objectives to respond to immediately:

- Seamlessly take over a call center mid-week that was failing to meet metrics
- Build a receptionist style system for Coloradans in emergency need for emergency assistance with referrals to other non-profit agencies
- Integrate court look-ups into call center system
- Provide omni-channel services to 10,500 weekly outreaches and reduce the number of repeat calls
- Offer services in multiple languages to inbound callers
- Reduce hold times from 30 minutes to 10 minutes or less
- Maintain talk times under 10 minutes
- Implement customer satisfaction scores and reach a minimum of 4.0 (out of 5.0) satisfaction

Complexity of the Task: The CARE Center took over a system plagued with significant operational challenges, compounded by a massive increase in volume. During the middle of the week, the CARE Center had to assume a call center that had 30 minute hold times and more than 10,000 contacts each week. Despite periods of high call volume, the goal was to reduce hold times within one week while also prioritizing emergency calls, verifying legal documentation, and providing multi-lingual assistance. Over time, the system was expected to make warm transfers to other agencies and additional resources. The contract later required us to implement an SMS text tool and halve hold times again, even with double the volume.

Results: Despite the complex operational requirements, the CARE Center achieved remarkable success. It successfully managed over 400,000 contacts annually while maintaining a 4.4 (out of 5.0) customer satisfaction rating—driven by a 90% single-contact resolution rate, a 30% reduction in repeat callers, and over 5,000 warm transfers. When asked to reduce contact time within a week—each time, the CARE Center was able to meet new needs and decrease average handle time by over 50%. The implementation of an efficient contact approach, the addition of the text tool, and the prioritization of emergency escalations proved highly effective in addressing the urgent community needs—enabling the CARE Center to cut hold and talk times in half, even amid rising contact volumes. This high-performing contact model

supported the distribution of hundreds of millions of dollars in state assistance and helped provide tens of thousands of evictions, underscoring its impact on both efficiency and outcomes.

Relevance to NDOL UI Call Center: The CARE Center’s performance directly maps to NDOL’s objectives. While the CARE Center manages nearly twice the call volume of the projected 70,000 annual UI contacts, it shares key challenges: the need for rapid stand-up, prioritization of high-stakes cases, and KPI-focused performance. The CARE Center’s experience reducing ASA and AHT under pressure, introducing new technologies mid-contract, and providing multilingual, trauma-informed support demonstrates readiness to deliver a UI call center that is efficient, accessible, and compliant with the State’s service expectations.

(b) Marshall Fire Rebuild Program Case Study

The Marshall Fire Rebuild Program case study highlights the CARE Center’s ability to rapidly deploy a fully operational, omni-channel call center with an effective tiered support structure – a strength that directly supports NDOL’s need for structured triage, timely service delivery, and scalable surge capacity.

Project and Objective: In response to the devastating Marshall Fire disaster in December 2021, local emergency responders stood up in-house contact systems that failed to meet local needs. Service provision organizations were overwhelmed by calls and paperwork. In late 2022, the CARE Center was tasked with rapidly establishing an efficient contact center capable of providing immediate, accurate support to affected residents. Objectives included:

- Setting up a receptionist-style service to answer FAQs and direct high-complexity issues
- Supporting basic document and application assistance for recovery grants
- Expanding to five additional funding programs within the first year

Complexity of the Task: The CARE Center was required to mobilize with exceptional speed, launching a fully operational contact center within just two weeks of receiving the contract. This involved setting up communication channels (primarily phone), developing a knowledge base, training staff, and creating processes for application support and document assistance under intense time pressure. Our job was to run interference: we had to answer as many questions as possible, support on basic tasks, and transfer complex cases to agencies with more expertise. The subsequent expansion to five additional grant and loan programs further increased the complexity, requiring additional training and resources. Handling 14,000 contacts over a year and aiding in the distribution of \$4.6 million in recovery funds across more than a dozen grants added to the logistical and administrative challenges.

Results: The CARE Center successfully established the contact center within the required two-week timeframe and dramatically reduced the burden on agencies with expertise. With single-call resolution, the stuck program became unstuck as experts—not unlike NDOL employees—could do their jobs rather than answer inquiries. The program effectively managed 14,000 contacts and aided 562 households (representing over 1,300 individuals) with \$4.6 million in recovery efforts. The ability to quickly launch and efficiently manage this program, despite its complexity and urgent nature, underscores the CARE Center’s operational capabilities and responsiveness in high-pressure situations.

Relevance to NDOL UI Call Center: NDOL’s UI call center will require a high-performing tiered

service model, balancing fast responses to common questions with efficient hand-offs of complex claims and appeals. The CARE Center's experience in deploying this type of system under disaster response conditions shows its ability to quickly operationalize new logic, reduce backlogs, and stabilize high-stakes systems. While smaller in total volume than NDOL's anticipated ~70,000 calls, this case proves the CARE Center can build systems that perform logically under pressure and scale, guided by leadership with a strong understanding of community needs, like Kirby Rising.

(c) City of Denver Temporary Rental & Utility Assistance Program Case Study:

This case study demonstrates the CARE Center's ability to manage a multi-channel contact center that handles legal documents, provides live application updates, and integrates chat support – all critical functions for a modernized UI call center environment.

Project and Objective: In 2023, the City of Denver's Department of Housing Stability (HOST) partnered with the CARE Center to address a critical need for application update assistance for their Temporary Rental & Utility Assistance Program. The core objective was to quickly implement an effective contact management solution, providing residents with timely updates, information about court systems, escalations for the most complex cases, and ensuring a seamless application process for rental and utility aid. The call center was designed to review and explain court documents and provide resolution so aid-administering agencies could complete their work without major interruption.

Complexity of the Task: The CARE Center was tasked with rapidly deploying a new system to manage a substantial volume of calls and chats. Managing 20,000 contacts annually demanded a robust infrastructure and well-trained personnel capable of handling inquiries efficiently and accurately. The system needed to be scalable and adaptable to potential variations in demand.

Results: The CARE Center successfully implemented a solution that effectively manages the significant volume of inquiries for Denver's Temporary Rental & Utility Assistance Program. The program now handles 22,000 calls and 2,500 chats per year, clearly demonstrating the CARE Center's capability to manage contact volumes at this level. The CARE Center provided timely application updates and assistance to residents, distributing \$15.7M to over 2,500 households.

Relevance to NDOL UI Call Center: Many UI claimants face time-sensitive deadlines tied to legal documentation (e.g., determination notices, appeals). The CARE Center's ability to handle legal documents, communicate clearly with clients under stress, and manage real-time application inquiries will be critical in helping NDOL deliver high-quality, equitable service through live agent interactions. Additionally, our successful deployment of chat and structured escalation logic previews our ability to help NDOL evolve toward self-service and digital-first pathways in future phases, while prioritizing immediate phone support.

i. Summary of Personnel/Management Approach

At the CARE Center, we deliver equitable access to public benefits through person-centered, high-performing contact centers. Our approach aligns closely with the NDOL's goal of providing responsive, respectful, and efficient customer service, primarily through phone interactions.

At peak volumes, the CARE Center handled around ~400,000 contacts annually, providing single-call resolution and frontline assistance with housing, legal aid, emergency financial relief, application management, and other public programs. Our team of trained contact center agents, case navigators, quality assurance reviewers, and technical support staff are well-versed in live phone support.

Our call centers achieve:

- 90% single-contact resolution
- ~5,000 warm transfers annually
- An 88% satisfaction rating

The CARE Center's system is designed to resolve the majority of inquiries during the first interaction, escalating only those that are complex, cross-agency, or require subject matter expertise—closely aligning with Nebraska's goals for effective triage, performance accountability, and reduced workload for DOL staff.

Our CARE Center model, recognized by the Colorado Governor's Operations Cabinet as best-practice for its low hold times and strong user feedback, is grounded in four key principles: Community, Access, Resource, and Education (further defined in the section a. Bidder Identification and Information.)

We've successfully implemented features like multilingual IVR, structured escalation logic, and automated status updates—tools that improve claimant experience, reduce repeat calls, and help meet UI-specific contact center goals such as rapid answer times, minimized handle time, and high customer satisfaction.

If awarded the contract, the CARE Center will deploy its existing, experienced CARE Center team to support the NDOL Contact Center, with key oversight from our Nebraska-native Vice President of Program Operations, Kirby Rising. This team brings an average tenure of over two years with 40% of the team being bilingual in English and Spanish – significantly higher than industry norms – reflecting strong retention and program consistency.

The CARE Center's staffing strategy emphasizes stability, experience, and alignment with the public service mission of Unemployment Insurance. We recognize that call center performance is deeply tied to workforce continuity and cultural fit—and that claimants deserve to speak with agents who are knowledgeable and invested in delivering a respectful experience.

To that end, the CARE Center has implemented a highly selective hiring process that prioritizes candidates with public-sector, customer service, or housing and benefits backgrounds. All agents go through structured scenario-based interviews and shadowing prior to hire.

The CARE Center has a competitive and selective recruiting process. Unlike other call centers, the CARE Center is a nonprofit, which allows us to recruit a more stable, higher-quality workforce than typical call centers paying near-minimum wages. Our nonprofit structure enables us to accept lower margins and reinvest in service quality, allowing us to offer living wages and employer-sponsored benefits that support long-term retention and strong performance—especially in high-touch, public facing roles. Our

compensation model exceeds typical entry-level call center rates and is coupled with access to benefits and clear advancement pathways. As a result, our average contact center agent tenure exceeds two years, which is significantly longer than industry norms in high-volume call centers.

From the NDOL UI perspective, this means lower onboarding risk, deeper institutional knowledge, and a team that can ramp quickly with minimal attrition, led by a team that understands the Nebraska context. Our team's existing familiarity with public benefits, documentation standards, and trauma-informed service delivery provides a strong foundation for delivering consistent, KPI-driven support to Nebraska claimants.

The CARE Center's training program is managed by our Learning and Development Lead and overseen by senior supervisory staff. The CARE Center's staff are trained to provide respectful, trauma-informed communication and work within clearly defined escalation pathways. Training methods include:

- Role-playing complex or ambiguous situations
- Call listening and review
- Live practice sessions focused on phone interactions
- Conflict resolution and de-escalation module
- UI-specific knowledge areas (eligibility, documentation, appeals)

We use Google Meet for live sessions and Absorb LMS for asynchronous modules. All training materials will be submitted to NDOL for review and approval.

Key personnel:

Name	Role	Responsibilities
Aly DeWills-Marcano	Director of Customer Care	Oversees day-to-day operations, manages KPIs, interfaces with NDOL
Carla Caltabiano	Call Center Supervisor / Quality Assurance	Oversees daily agent performance, conducts live QA reviews, enforces protocol adherence, and ensures KPI compliance
To be named within 2 weeks of award	Call Center Agents	Handles calls, provide Tier 1 support, triage issues
Elaine French	Senior Development & Data Analyst	Oversees quality reporting
Elaine Jackson	Training & Onboarding Lead	Oversees agent training, live practice sessions, LMS content
Jayda Zeller	Cybersecurity & IT Support Specialist	Provides oversight and support on security

Miles Tonini	Technical support and Systems Management – Call Center	IVR, CRM tagging, escalation tools
Kirby Rising	Vice President of Program Operations	Oversees implementation timeline, compliance with RFP terms, bringing a Nebraska perspective to all operational decisions
Sam Gilman	Chief Executive Officer	Maintains executive relationship, ensures alignment with NDOL mission

Note: Resumes for all named personnel are attached per RFP guidelines; all CARE Center employees have been hired under the Community Economic Defense Project. Any change to this roster post-award will be submitted to NDOL for approval.

j. Subcontractors

PSV does not plan to subcontract any part of its performance.

2. Technical Response

a. Understanding of business requirements

The Nebraska Department of Labor (NDOL) is seeking a responsive, high-performing call center vendor to support its Unemployment Insurance (UI) Division in handling an estimated 71,000 inbound calls annually. This includes over 5,000 calls from non-English speakers and approximately 9,000 scheduled callbacks. The vendor will be responsible for delivering timely, respectful, and accurate assistance to individuals navigating UI services, ensuring high-quality interactions that reduce repeat contacts, maintain strong claimant satisfaction, and comply with all documentation and retention requirements.

The CARE Center understands the critical role this call center will play in helping Nebraskans during economic transitions, and we are prepared to provide a seamless, primarily phone-based service experience from day one. Our team has extensive experience operating call centers for state and local agencies, including UI-adjacent programs such as rental assistance, disaster response, and court-related services. These programs have required us to balance compassionate service with accuracy, volume responsiveness, and technical integration, all with a strong focus on direct client communication.

We are fully equipped to meet NDOL's stated goals, including:

- Answering 98% of calls between 8:00 AM and 5:00 PM CST
- Maintaining an average speed to answer (ASA) of ≤ 3 minutes
- Keeping abandonment rates $\leq 10\%$ and repeat caller rates $\leq 20\%$
- Achieving a customer satisfaction score (CSAT) of $\geq 85\%$
- Supporting scheduled callbacks, multilingual access, and CRM documentation

Multilingual capability

50%+ of the CARE Center's agent workforce is fluent in English and Spanish, ensuring we can serve Nebraska's diverse population. In cases where other languages are needed, we use simultaneous interpretation services to support real-time translation.

Staffing model and training

The CARE Center's staffing approach is designed for liability and scale. We maintain a core team of experienced agents trained in trauma-informed, equity-centered service delivery, with a particular emphasis on effective phone communication. For NDOL, we will provide six agents (including Spanish-speaking staff), a dedicated supervisor, and QA oversight, all overseen by our Nebraska-rooted leadership. We will tailor training materials in collaboration with NDOL, including UI-specific scripts, intake protocols, and documentation standards, with a strong focus on phone-based interactions.

Technology and reporting readiness

Our team will integrate with NDOL's NEworks system and configure IVR flows that are ADA-compliant and optimized for efficient call routing. All calls will be recorded and logged according to data retention

standards. We also offer real-time performance dashboards and monthly KPI reporting aligned with NDOL's SLA requirements, ensuring full transparency in our call center operations.

Launch plan

The CARE Center is prepared to go live on October 1, 2025 with a fully trained team and integrated call-centric infrastructure, guided by the practical understanding of our Nebraska leadership. We have included a detailed work plan outlining the steps for staffing, systems integration, script development, pilot testing, and performance monitoring. We have experience completing similar implementations on time for government clients and understand the urgency and sensitivity required for UI programs.

We look forward to bringing our proven call center expertise to NDOL's UI program and ensuring that Nebraskans can access timely, respectful, and informed support at a critical time in their lives.

b. Detailed project work plan

Phase 1: Kick off

1.1 NDOL Engagement

- Kickoff meeting scheduled for September 12, 2025, immediately following award, with Kirby Rising playing a key role in ensuring alignment with Nebraska's values
- Alignment on scope, escalation protocols, performance expectations, and reporting cadence
- Finalize staffing plan and hiring timeline with NDOL input
- **Milestone:** Kickoff completed and mutual workplan finalized – September 12, 2025

Phase 2: Systems Integration

2.1 Core Platforms

- Confirm IVR call flows, CRM tagging, and security protocols – September 11-18
 - IVR and digital channels will be ADA compliant
- Configure API integration with NEworks or other relevant state systems
- Conduct system tests and simulate key call types, focusing on efficient call handling
- **Milestones:**
 - IVR/CRM/call routing configuration complete – September 18, 2025
 - First successful system test call – September 27, 2025

2.2 Information Security & Compliance

- HIPAA-compliant infrastructure
- Role-based access and audit logs
- Secure hosting, encrypted voice logs
- **Milestone:** NDOL-specific security protocols confirmed – September 18, 2025

2.3 Communication

- Real-time alerts for issue escalation and hot topics (e.g., system outages)
- **Milestone:** Escalation and alerting system reviewed with NDOL – September 27, 2025

Phase 3: Staff Training & Script Development

3.1 Staffing Status for NDOL UI Contract

- Existing UI call center agents are already hired, bringing a valuable experience to serving Nebraskans

- Hire and onboard additional agents – September 11-26
- Assign dedicated NDOL supervisor, QA specialist, and tech liaison
- **Milestone:** All staff hired and onboarded – September 26, 2025

3.2 Training timeline

- September 15-19: Training curriculum developed with NDOL input
- September 22-26: Staff training and mock call sessions
- September 29-30: Final QA check and readiness validation
- **Milestones:**
 - Training curriculum finalized – September 19, 2025
 - Full team readiness confirmed – September 30, 2025

3.3 Script Development & Agent Protocols

- Develop UI-specific scripts collaboratively with NDOL (voice) – September 15-24
 - Includes greeting, intake, eligibility probing, documentation explanation, and escalation flows
 - Aligned with trauma-informed and equity-centered communication practices
- Integrate scripts into agent dashboards and CRM
- **Milestones:**
 - Script framework drafted and shared with NDOL – September 15, 2025
 - Final scripts delivered and loaded – September 24, 2025
 - Live script feedback loop and revision plan active – Ongoing post launch

Phase 4: Pilot Testing

4.1 QA Model

- 5% call sampling rate per agent, reviewed weekly
- Live call monitoring and asynchronous QA reviews
- Monthly scorecards and coaching for all agents
- **Milestone:** QA scoring system and rubric finalized – September 27, 2025

4.2 Workforce Management

- Real-time agent availability tracking
- Surge capacity protocols for peak periods (Monday mornings, post-holidays)
- Ongoing performance dashboards visible to NDOL
- **Milestone:** Workforce management systems activated – September 30, 2025

4.3 Pilot simulation and quality control

- Conduct supervised simulations for voice – September 26-30
- Monitor key metrics (ASA, AHT, CSAT, ACW)
- QA team completes live reviews and delivers agent feedback
- NDOL provided full access to dashboards and reports for review
- **Milestone:** Pilot testing complete and launch readiness confirmed – September 30, 2025

Phase 5: Full-scale implementation

5.1 Go-live and operational oversight

- Launch voice and CRM tracking – October 1, 2025
- Maintain all RFP-aligned KPIs:
 - $ASA \leq 3 \text{ min}$

- AHT \leq 10 min
- ACW \leq 1.5 min
- CSAT \geq 85%
- Abandonment \leq 10%
- Hold monthly operational check-ins / report outs with NDOL
- QA sampling and coaching initiated at launch
- **Milestones:**
 - Day 1 operational success metrics shared – October 2, 2025
 - First full KPI report delivered – November 1, 2025

Phase 6: Post-Go-Live Optimization

6.1 Channel tuning and UX improvements

- October 2025-December 2025: Monitor usage
- Refine scripts and escalation flows based on real usage
- Adjust CRM logic and routing logic for improved agent experience
- **Milestones:**
 - Updated post-launch scripting released – December 15, 2025
 - Cross-channel performance trends shared – January 10, 2026

c. Deliverables and due dates

Milestone / Deliverable	Responsible Lead(s)	Date
Kickoff meeting completed	Kirby Rising, Aly DeWills-Marcano	Sept 12, 2025
IVR/CRM/cht/SMS configuration finalized	Miles Tonini	September 18, 2025
Security protocols verified	Jayda Zeller, Aly DeWills-Marcano	September 18, 2025
Training materials and schedule finalized	Elaine Jackson, Lisa Mares	September 24, 2025
Script framework finalized	Aly DeWills-Marcano, Lisa Mares	September 24, 2025
Staff hiring and onboarding complete	Aly DeWills-Marcano	September 26, 2025
Training and mock calls executed	Aly DeWills-Marcano	September 26, 2025
Pilot testing completed	Aly DeWills-Marcano, Miles Tonini	September 30, 2025
Full Go-live implementation	Aly DeWills-Marcano	October 1, 2025


First KPI report delivered	Elaine French, Aly DeWills-Marcano	October 7, 2025
Post-launch channel updates shared	Aly DeWills-Marcano, Miles Tonini	Jan 10, 2026



The Community Firm dba Community Economic Defense Project

**Independent Auditor's Reports
and Financial Statements**

December 31, 2023 and 2022



The Community Firm dba Community Economic Defense Project
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December 31, 2023 and 2022

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Independent Auditor's Report

Board of Directors
The Community Firm dba Community Economic Defense Project
Denver, Colorado

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of The Community Firm dba Community Economic Defense Project (CEDP), which comprise the statements of financial position as of December 31, 2023 and 2022, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of CEDP, as of December 31, 2023 and 2022, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*). Our responsibilities under those standards are further described in the "Auditor's Responsibilities for the Audit of the Financial Statements" section of our report. We are required to be independent of CEDP and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about CEDP's ability to continue as a going concern within one year after the date that these financial statements are issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of CEDP's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about CEDP's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Supplementary Information

Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The schedule of expenditures of federal awards as required by Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with GAAS. In our opinion, the schedule of expenditures of federal awards is fairly stated, in all material respects, in relation to the financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated September 26, 2024, on our consideration of CEDP's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of CEDP's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering CEDP's internal control over financial reporting and compliance.

Forvis Mazars, LLP

**Denver, Colorado
September 26, 2024**

The Community Firm dba Community Economic Defense Project
Statements of Financial Position
December 31, 2023 and 2022

	<u>2023</u>	<u>2022</u>
ASSETS		
Cash	\$ 8,134,650	\$ 17,655,004
Grants and contracts receivable, net	7,398,802	5,730,134
Right-of-use asset - operating lease	261,427	-
Prepaid expense and other	<u>333,343</u>	<u>266,583</u>
Total assets	<u><u>\$ 16,128,222</u></u>	<u><u>\$ 23,651,721</u></u>
LIABILITIES		
Accounts payable and accrued expenses	\$ 253,691	\$ 386,420
Operating lease liability	304,406	-
Refundable advances	6,379,963	16,969,945
Term loan	<u>3,000,000</u>	<u>3,000,000</u>
Total liabilities	<u>9,938,060</u>	<u>20,356,365</u>
NET ASSETS		
Without donor restrictions	4,440,986	3,107,896
With donor restrictions	<u>1,749,176</u>	<u>187,460</u>
Total net assets	<u>6,190,162</u>	<u>3,295,356</u>
Total liabilities and net assets	<u><u>\$ 16,128,222</u></u>	<u><u>\$ 23,651,721</u></u>

The Community Firm dba Community Economic Defense Project
Statement of Activities
Year Ended December 31, 2023

	Without Donor Restrictions	With Donor Restrictions	Total
Revenues and Other Support			
Federal, state, and local contracts and grants	\$ 66,871,729	\$ -	\$ 66,871,729
Contributions - financial assets	376,591	2,014,620	2,391,211
Contributions - nonfinancial assets	-	64,800	64,800
Interest and other income	34,333	-	34,333
Net assets released from restrictions	517,704	(517,704)	-
	<u>67,800,357</u>	<u>1,561,716</u>	<u>69,362,073</u>
Expenses			
Program services	64,255,267	-	64,255,267
Support services	2,212,000	-	2,212,000
	<u>66,467,267</u>	<u>-</u>	<u>66,467,267</u>
Change in Net Assets	1,333,090	1,561,716	2,894,806
Net Assets, Beginning of Year	<u>3,107,896</u>	<u>187,460</u>	<u>3,295,356</u>
Net Assets, End of Year	<u>\$ 4,440,986</u>	<u>\$ 1,749,176</u>	<u>\$ 6,190,162</u>

The Community Firm dba Community Economic Defense Project
Statement of Activities
Year Ended December 31, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Revenues and Other Support			
Federal, state, and local contracts and grants	\$ 82,644,220	\$ -	\$ 82,644,220
Contributions - financial assets	1,524,874	187,460	1,712,334
Contributions - nonfinancial assets	-	85,714	85,714
Interest and other income	82,089	-	82,089
Net assets released from restrictions	226,723	(226,723)	-
	<u>84,477,906</u>	<u>46,451</u>	<u>84,524,357</u>
Expenses			
Program services	80,763,057	-	80,763,057
Support services	1,204,114	-	1,204,114
	<u>81,967,171</u>	<u>-</u>	<u>81,967,171</u>
Change in Net Assets	2,510,735	46,451	2,557,186
Net Assets, Beginning of Year	<u>597,161</u>	<u>141,009</u>	<u>738,170</u>
Net Assets, End of Year	<u>\$ 3,107,896</u>	<u>\$ 187,460</u>	<u>\$ 3,295,356</u>

The Community Firm dba Community Economic Defense Project
Statement of Functional Expenses
Year Ended December 31, 2023

	Program Services									
	Integrated Financial Assistance and Household Stability Services	Mortgage Assistance	Legal Aid	Disaster Relief	Public Policy and Organizing	Total Program	Management and General	Fundraising	Total Support	Total Expenses
Direct client assistance	\$ 43,273,179	\$ 11,473,900	\$ 103,927	\$ -	\$ -	\$ 54,851,006	\$ -	\$ -	\$ -	\$ 54,851,006
Salaries, benefits and taxes	5,206,268	400,013	1,916,938	607,624	440,351	8,571,194	1,297,054	-	1,297,054	9,868,248
Professional fees	165,496	2,793	49,416	-	117,290	334,995	270,809	8,708	279,517	614,512
Grants	40,000	-	-	-	-	40,000	-	-	-	40,000
Office	4,231	598	92,031	-	5,523	102,383	82,396	7,671	90,067	192,450
Interest expense	-	-	-	-	-	-	64,800	-	64,800	64,800
Facility	5,100	-	9	-	20	5,129	119,172	-	119,172	124,301
Information technology	200,351	10,000	116,765	-	-	327,116	315,733	-	315,733	642,849
Staff development and travel	926	480	20,245	-	1,793	23,444	45,657	-	45,657	69,101
Total expenses	<u>\$ 48,895,551</u>	<u>\$ 11,887,784</u>	<u>\$ 2,299,331</u>	<u>\$ 607,624</u>	<u>\$ 564,977</u>	<u>\$ 64,255,267</u>	<u>\$ 2,195,621</u>	<u>\$ 16,379</u>	<u>\$ 2,212,000</u>	<u>\$ 66,467,267</u>

The Community Firm dba Community Economic Defense Project
Statement of Functional Expenses
Year Ended December 31, 2022

	Program Services						
	Integrated Financial Assistance and Household Stability Services	Legal Aid	Disaster Relief	Public Policy and Organizing	Total Program	Management and General	Total Expenses
Direct client assistance	\$ 73,769,349	\$ -	\$ -	\$ -	\$ 73,769,349	\$ -	\$ 73,769,349
Salaries, benefits and taxes	5,233,236	838,770	39,266	72,659	6,183,931	668,334	6,852,265
Professional fees	139,369	38,611	-	159,605	337,585	203,265	540,850
Office	45,140	3,841	-	9	48,990	225,809	274,799
Interest expense	-	-	-	-	-	64,800	64,800
Facility	19,423	4,382	-	448	24,253	3,531	27,784
Information technology	330,738	63,422	-	3,556	397,716	12,017	409,733
Staff development and travel	34	1,126	-	73	1,233	26,358	27,591
Total expenses	<u>\$ 79,537,289</u>	<u>\$ 950,152</u>	<u>\$ 39,266</u>	<u>\$ 236,350</u>	<u>\$ 80,763,057</u>	<u>\$ 1,204,114</u>	<u>\$ 81,967,171</u>

The Community Firm dba Community Economic Defense Project
Statements of Cash Flows
Years Ended December 31, 2023 and 2022

	<u>2023</u>	<u>2022</u>
Operating Activities		
Change in net assets	\$ 2,894,806	\$ 2,557,186
Noncash operating lease expense	42,181	-
Depreciation expense	5,644	5,107
Changes in		
Grants and contracts receivable, net	(1,668,668)	(2,825,390)
Prepaid expenses and other	(72,404)	(226,895)
Accounts payable and accrued expenses	(132,729)	284,212
Refundable advances	(10,589,982)	14,094,474
Operating lease liability	798	-
	<u>(9,520,354)</u>	<u>13,888,694</u>
Net cash provided by (used in) operating activities	<u>(9,520,354)</u>	<u>13,888,694</u>
Net Increase (Decrease) in Cash	(9,520,354)	13,888,694
Cash, Beginning of Year	<u>17,655,004</u>	<u>3,766,310</u>
Cash, End of Year	<u><u>\$ 8,134,650</u></u>	<u><u>\$ 17,655,004</u></u>

Note 1. Organization and Summary of Significant Accounting Policies

Nature of Operations

The Community Firm dba Community Economic Defense Project (CEDP) is a not-for-profit organization established to provide social services, public benefits, and policy change. Our mission is to partner with low income and working people to build economic and racial equity. We do this by providing emergency services, confronting economic abuse, and investing in community wealth. We use an ever-evolving set of legal, economic and advocacy tools to challenge and dismantle unjust systems, building quickly towards a world where all people have what they need to live and thrive.

Specifically, CEDP serves low-income Coloradans in partnership with legal aid organizations, social services providers, and organizations by and for BIPOC communities to ensure resources reach those at greatest risk of displacement with deference to local and cultural context. Founded as a community organizing and legal aid project known as the COVID-19 Eviction Defense Project, CEDP has evolved and broadened our mission to respond to our clients' lived experiences of displacement. Three core principles drive our programs. (A) Payments should move faster than the displacement timeline. (B) All the wrap-around services a client might need should be integrated under one roof, so asking for help is not a full-time job. (C) services should be tied to community through integration with community organizations to ensure that people can equitably access services and that client voices are elevated to the policymaking table.

Integrated Financial Assistance and Household Stability Services

The Organization offers a fund that provides emergency financial assistance to renters facing eviction or displacement and homeowners facing foreclosure or displacement. In partnership with state and local government emergency assistance programs, CEDP qualifies renters facing eviction and displacement for benefits, and it issues quick, accurate financial assistance checks. Its emergency rental assistance program is designed to move faster than the eviction timeline, with capabilities to qualify tenants for benefits and issue payments in less than 24 hours when needed to stabilize a household. Since July 2022, CEDP has also managed the State of Colorado's emergency intake system for renters and homeowners facing displacement. This intake system answers tenant calls about the assistance programs, features intake agents at courthouses across the state, and coordinates among service providers. Through this program, CEDP makes referrals to its own eviction prevention and homelessness and foreclosure diversion programs, and coordinates service delivery with other service providers across the state for household stability services and other needed benefits and services.

Legal Aid

Through CED Law, the Organization offers legal assistance to renters facing eviction in the state of Colorado. Managed separately from the Financial Assistance and Household Stability Services Program, CED Law provides legal assistance to Coloradans facing eviction, foreclosure or struggling with consumer and housing debt burdens. Depending on client need, attorneys provide advice, limited assistance representation, or full-service legal representation. CED Law also manages legal aid clinics alongside community partners and in courthouses across the state.

Disaster Relief

In late 2022, CEDP launched a disaster response program. This effort leverages technology and programs, developed to respond to the COVID-19 pandemic, to support Colorado residents affected by natural disasters including fires and floods. This program works in partnership with local governments and other non-profit agencies to ensure that residents can access relief and recovery funds.

The Community Firm dba Community Economic Defense Project
Notes to Financial Statements
December 31, 2023 and 2022

Public Policy and Organizing

The Organization’s clients have pushed the organization to amplify their experiences into policy change. The public policy and organizing function invests in storytelling and data to inform policy debates. CEDP also engages in advocacy on a limited basis on housing, consumer, economic, and civil legal issues that are directly related to its mission and clients’ lived experience.

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues, expenses, gains, losses, and other changes in net assets during the reporting period. Actual results could differ from those estimates.

Cash

At December 31, 2023, CEDP’s cash accounts exceeded federally insured limits by approximately \$7,300,000.

Grants and Contracts Receivable

Support funded by grants is recognized as CEDP meets the conditions prescribed by the grant agreement, performs the contracted services or incurs outlays eligible for reimbursement under the grant agreements. Revenue from grants and contracts received in advance is deferred and recognized over the periods to which the grants and contracts relate.

Grant activities and outlays are subject to audit and acceptance by the granting agency and, as a result of such audit, adjustments could be required.

Net Assets

Net assets, revenues, gains and losses are classified based on the existence or absence of donor restrictions.

Net assets without donor restrictions are available for use in general operations and not subject to donor restrictions.

Net assets with donor restrictions contain restrictions which are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor.

Contributions

Contributions are provided to CEDP either with or without restrictions placed on the gift by the donor. Revenues and net assets are separately reported to reflect the nature of those gifts – with or without donor restrictions. The value recorded for each contribution is recognized as follows:

Nature of the Gift	Value Recognized
<i>Conditional gifts, with or without restriction</i> Gifts that depend on CEDP overcoming a donor-imposed barrier to be entitled to the funds	Not recognized until the gift becomes unconditional, <i>i.e.</i> , the donor-imposed barrier is met

The Community Firm dba Community Economic Defense Project
Notes to Financial Statements
December 31, 2023 and 2022

Nature of the Gift	Value Recognized
<i>Unconditional gifts, with or without restriction</i>	
Received at date of gift – cash and other assets	Fair value
Received at date of gift – property, equipment and long-lived assets	Estimated fair value
Expected to be collected within one year	Net realizable value
Collected in future years	Initially reported at fair value determined using the discounted present value of estimated future cash flows technique

In addition to the amount initially recognized, revenue for unconditional gifts to be collected in future years is also recognized each year as the present-value discount is amortized using the level-yield method.

When a donor stipulated time restriction ends or purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions. Absent explicit donor stipulations for the period of time that long-lived assets must be held, expirations of restrictions for gifts of land, buildings, equipment and other long-lived assets are reported when those assets are placed in service.

Gifts having donor stipulations which are satisfied in the period the gift is received are recorded as revenue and net assets without donor restrictions.

Conditional contributions having donor stipulations which are satisfied in the period the gift is received are recorded as revenue and net assets without donor restrictions.

Contributed Nonfinancial Assets

In addition to receiving cash contributions, CEDP receives nonfinancial (in-kind) contributions from various donors. It is the policy of CEDP to record the estimated fair value of these contributions as an expense in its financial statements and similarly increase contribution revenue by the same amount. Nonfinancial contributions include various general operating services provided to CEDP at discounted rates. CEDP estimates fair value based on readily available market rate for similar services. Services received are restricted to specific programs and, thus, are reported as restricted contributions.

Income Taxes

The Foundation is exempt from income taxes under Section 501 of the Internal Revenue Code and a similar provision of state law. However, CEDP is subject to federal income tax on any unrelated business taxable income. CEDP files tax returns in the U.S. federal jurisdiction.

Functional Allocation of Expenses

The costs of supporting the various programs and other activities have been summarized on a functional basis in the statement of activities. The statement of functional expenses presents the natural classification detail of expenses by function. Certain costs have been allocated among the program and management and general categories based on effort expended in each respective category.

The Community Firm dba Community Economic Defense Project
Notes to Financial Statements
December 31, 2023 and 2022

Subsequent Events

Subsequent events have been evaluated through September 26, 2024, which is the date the financial statements were available to be issued.

Note 2. Liquidity and Availability

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of December 31, 2023 and 2022 comprise the following:

	<u>2023</u>	<u>2022</u>
Financial Assets Available		
Cash	\$ 8,134,650	\$ 17,655,004
Grants and contracts receivable, net	<u>7,398,802</u>	<u>5,730,134</u>
	<u>15,533,452</u>	<u>23,385,138</u>
Less Amounts Not Available to be Used Within One Year		
Net assets with donor restrictions	<u>1,749,176</u>	<u>187,460</u>
Financial Assets Available to be Used Within One Year	<u><u>\$ 13,784,276</u></u>	<u><u>\$ 23,197,678</u></u>

CEDP manages its liquidity and reserves following three guiding principles: operating within a prudent range of financial soundness and stability, maintaining adequate liquid assets to fund near-term operating needs, and maintaining sufficient reserves to provide reasonable assurance that long-term obligations will be discharged. CEDP forecasts its future cash flows and monitors its liquidity monthly and monitors its reserves annually. During the years ended December 31, 2023 and 2022, the level of liquidity and reserves was managed within the guidelines outlined above.

CEDP carries a \$3,000,000 revolving term loan (see Note 5) as part of a liquidity management plan.

Note 3. Grant Reimbursements Receivable and Future Commitments

CEDP receives its grant support through periodic claims filed with the respective funding sources, not to exceed a limit specified in the funding agreement. Since the financial statements of CEDP are prepared on the accrual basis, all earned portions of the grants not yet received as of December 31, 2023 and 2022, have been recorded as receivables.

Following are the grant commitments that extend beyond December 31, 2023:

<u>Grant</u>	<u>Term</u>	<u>Grant Amount</u>	<u>Earned Through 2023</u>	<u>Funding Available</u>
Federal, State and Government grants	Various terms through September 2024	\$ 190,294,141	\$ 132,147,558	\$ 48,465,505
Private grants	Various terms through September 2024	<u>3,500,000</u>	<u>1,750,000</u>	<u>1,750,000</u>
		<u><u>\$ 193,794,141</u></u>	<u><u>\$ 133,897,558</u></u>	<u><u>\$ 50,215,505</u></u>

The Community Firm dba Community Economic Defense Project
Notes to Financial Statements
December 31, 2023 and 2022

Note 4. Leases

Accounting Policies

CEDP determines if an arrangement is a lease or contains a lease at inception. Leases result in the recognition of ROU assets and lease liabilities on the statements of financial position. ROU assets represent the right to use an underlying asset for the lease term, and lease liabilities represent the obligation to make lease payments arising from the lease, measured on a discounted basis. CEDP determines lease classification as operating or finance at the lease commencement date.

CEDP combines lease and nonlease components, such as common area and other maintenance costs, and accounts for them as a single lease component in calculating the ROU assets and lease liabilities for its office buildings and employee vehicles.

At lease commencement, the lease liability is measured at the present value of the lease payments over the lease term. The ROU asset equals the lease liability adjusted for any initial direct costs, prepaid or deferred rent, and lease incentives. CEDP has made a policy election to use a risk-free rate (the rate of a zero-coupon U.S. Treasury instrument) for the initial and subsequent measurement of all lease liabilities. The risk-free rate is determined using a period comparable with the lease term.

The lease term may include options to extend or to terminate the lease that CEDP is reasonably certain to exercise. Lease expense is generally recognized on a straight-line basis over the lease term.

CEDP has elected not to record leases with an initial term of 12 months or less on the statements of financial position. Lease expense on such leases is recognized on a straight-line basis over the lease term.

Nature of Leases

CEDP has entered into the following lease arrangement:

Operating Lease

CEDP entered into a lease for office space during 2023 that expires in 2026. Termination of the lease is generally prohibited unless there is a violation under the lease agreement.

Quantitative Disclosures

The lease cost and other required information for the year ended December 31, 2023 are:

Lease cost	
Operating lease cost	<u>\$ 40,375</u>
Other information	
Cash paid for amounts included in the measurement of lease liability	
Operating cash flows from operating lease	\$ 43,747
Right-of-use assets obtained in exchange for new operating lease liabilities	\$ 303,608
Weighted-average remaining lease term	
Operating lease	2.5 years
Weighted-average discount rate	
Operating lease	4.57%

The Community Firm dba Community Economic Defense Project
Notes to Financial Statements
December 31, 2023 and 2022

Future minimum lease payments and reconciliation to the statement of financial position at December 31, 2023, are as follows:

	Operating Lease
2024	\$ 106,305
2025	109,498
2026	<u>113,567</u>
Total future undiscounted lease payments	329,370
Less imputed interest	<u>(24,964)</u>
Lease liability	<u><u>\$ 304,406</u></u>

Note 5. Term Loan

CEDP has a noninterest bearing \$3,000,000 revolving loan with Colorado Housing and Finance Authority. The agreement requires CEDP to comply with certain financial and nonfinancial covenants. The maturity date for this line of credit is December 31, 2024. CEDP recorded the imputed interest on the loan in the amount of \$64,800 for the years ended December 31, 2023 and 2022.

Note 6. Net Assets

Net Assets With Donor Restrictions

Net assets with donor restrictions at December 31, 2023 and 2022 are restricted for the following purposes or periods:

	<u>2023</u>	<u>2022</u>
Subject to expenditure for specified purpose		
Housing programs	\$ 1,693,343	\$ 120,000
Public policy	<u>55,833</u>	<u>67,460</u>
	<u><u>\$ 1,749,176</u></u>	<u><u>\$ 187,460</u></u>

The Community Firm dba Community Economic Defense Project
Notes to Financial Statements
December 31, 2023 and 2022

Net Assets Released from Restriction

Net assets were released from donor restrictions by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by donors.

	<u>2023</u>	<u>2022</u>
Satisfaction of purpose restrictions		
Housing programs	\$ 474,427	\$ 152,381
Public policy	43,277	50,000
Adams County programming	<u>-</u>	<u>24,342</u>
	<u>\$ 517,704</u>	<u>\$ 226,723</u>

Note 7. Retirement Plan

CEDP has a 401(k) plan covering substantially all full-time employees. CEDP contributes 3% of eligible compensation to the plan. Contributions to the plan were \$243,371 and \$167,724 for the years ended December 31, 2023 and 2022, respectively.

Note 8. Related-Party Transactions

Some members of management and CEDP's Board sit on other nonprofit boards or are members of management of other nonprofit organizations in the Denver, Colorado area. These entities are considered related parties to CEDP. During the years ended December 31, 2023 and 2022, CEDP purchased programmatic services from related parties totaling approximately \$151,600 and \$140,000, respectively.

Note 9. Significant Estimates and Concentrations

Accounting principles generally accepted in the United States of America require disclosure of certain significant estimates and current vulnerabilities due to certain concentrations. Those matters include the following:

Cash

CEDP's cash is primarily invested with one financial institution. While the funds are distributed among several accounts, given the concentration, CEDP regularly monitors the creditworthiness of the financial institution.

Contributions

During 2023 and 2022, federal and state contracts and grants were received from three municipalities 75% and 85% of contributions were received from two donors, respectively.

Supplementary Information

The Community Firm dba Community Economic Defense Project
Schedule of Expenditures of Federal Awards
Year Ended December 31, 2023

Federal Grantor/Pass-Through Grantor and Program Title	Federal Assistance Listing Number	Pass-Through Entity Identifying Number	Passed Through to Subrecipients	Total Federal Expenditures
<u>U.S. Department of Treasury</u>				
Pass-Through from Colorado Department of Local Affairs, for the benefit of Division of Housing:				
COVID-19 Emergency Rental Assistance Program 2 (ERAP)	21.023	H1ERA21138	\$ -	\$ 35,040,933
COVID-19 Emergency Rental Assistance Program - Care Center (ERAP 2)	21.023	H1ERA21138	-	1,433,673
COVID-19 State of Colorado - Project Delivery (ERAP 2)	21.023	H1ERA21138	-	1,942,378
COVID-19 State of Colorado Legal (ERAP 2)	21.023	H1ERA21138	-	73,535
<i>Total Pass-Through Colorado Department of Local Affairs, for the benefit of Division of Housing</i>			-	38,490,519
Pass-Through from City and County of Denver:				
Emergency Rental Assistance Program (2)	21.023	HOST-20237029804/ HOST-202262616-04	-	6,428,752
<i>Total Pass-Through City and County of Denver</i>			-	6,428,752
<i>Total Emergency Rental Assistance Program</i>			-	44,919,271
Pass-Through from Colorado Department of Local Affairs, for the benefit of Division of Housing:				
COVID-19 Coronavirus State and Local Fiscal Recovery Funds	21.027	H3HAF23013/ H4HAF24150	-	11,726,070
Pass-Through from City and County of Denver:				
COVID-19 Coronavirus State and Local Fiscal Recovery Funds	21.027	H3HAF23013/ H4HAF24150	-	3,863,194
<i>Total COVID-19 Coronavirus State and Local Fiscal Recovery Funds</i>			-	15,589,264
<i>Total U.S. Department of Treasury</i>			-	60,508,535
<u>U.S. Department of Housing and Urban Development</u>				
Pass-Through from City of Colorado Springs				
CDBG Entitlement Grants Cluster				
Community Development Block Grant (CDBG)	14.218	C-11458	-	21,858
<i>Total U.S. Department of Housing and Urban Development and CDBG Entitlement Grants Cluster</i>			-	21,858
Total			\$ -	\$ 60,530,393

The accompanying notes are an integral part of this schedule.

The Community Firm dba Community Economic Defense Project
Notes to the Schedule of Expenditures of Federal Awards
Year Ended December 31, 2023

Note 1. Basis of Presentation

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal award activity of CEDP under programs of the federal government for the year ended December 31, 2023. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of CEDP, it is not intended to and does not present the financial position, changes in net assets or cash flows of CEDP.

Note 2. Summary of Significant Accounting Policies

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

Note 3. Indirect Cost Rate

CEDP has elected not to use the 10 percent de minimis indirect cost rate allowed under the Uniform Guidance.

Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with Government Auditing Standards

Independent Auditor's Report

Board of Directors
The Community Firm dba Community Economic Defense Project
Denver, Colorado

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*), the financial statements of The Community Firm dba Community Economic Defense Project (CEDP), which comprise the CEDP's statement of financial position as of December 31, 2023, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated September 26, 2024.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the CEDP's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the CEDP's internal control. Accordingly, we do not express an opinion on the effectiveness of the CEDP's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the CEDP's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of This Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Forvis Mazars, LLP

Denver, Colorado
September 26, 2024

Report on Compliance for Each Major Federal Program and Report on Internal Control Over Compliance

Independent Auditor's Report

Board of Directors
The Community Firm dba Community Economic Defense Project
Denver, Colorado

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited The Community Firm dba Community Economic Defense Project (CEDP)'s compliance with the types of compliance requirements identified as subject to audit in the *OMB Compliance Supplement* that could have a direct and material effect on each of CEDP's major federal programs for the year ended December 31, 2023. CEDP's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, CEDP complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended December 31, 2023.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the "Auditor's Responsibilities for the Audit of Compliance" section of our report.

We are required to be independent of CEDP and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of CEDP's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to CEDP's federal programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on CEDP's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about CEDP's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding CEDP's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of CEDP's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of CEDP's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control Over Compliance

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the "Auditor's Responsibilities for the Audit of Compliance" section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Forvis Mazars, LLP

**Denver, Colorado
September 26, 2024**

The Community Firm dba Community Economic Defense Project
Schedule of Findings and Questioned Costs
Year Ended December 31, 2023

Section I – Summary of Auditor’s Results

Financial Statements

1. Type of report the auditor issued on whether the financial statements audited were prepared in accordance with GAAP:

☒ **Unmodified** ☐ **Qualified** ☐ **Adverse** ☐ **Disclaimer**

2. Internal control over financial reporting:

Significant deficiency(ies) identified? ☐ **Yes** ☒ **None Reported**

Material weakness(es) identified? ☐ **Yes** ☒ **No**

3. Noncompliance material to the financial statements noted? ☐ **Yes** ☒ **No**

Federal Awards

4. Internal control over major federal awards programs:

Significant deficiency(ies) identified? ☐ **Yes** ☒ **None Reported**

Material weakness(es) identified? ☐ **Yes** ☒ **No**

5. Type of auditor’s report issued on compliance for major federal award program(s):

☒ **Unmodified** ☐ **Qualified** ☐ **Adverse** ☐ **Disclaimer**

6. Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)? ☐ **Yes** ☒ **No**

7. Identification of major federal programs:

<u>Assistance Listing Number(s)</u>	<u>Name of Federal Program or Cluster</u>
21.023	COVID-19 Emergency Rental Assistance Program
21.027	COVID-19 Coronavirus State and Local Fiscal Recovery Funds

8. Dollar threshold used to distinguish between Type A and Type B programs: \$1,815,912

9. Auditee qualified as a low-risk auditee? ☐ **Yes** ☒ **No**

**The Community Firm dba Community Economic Defense Project
Schedule of Findings and Questioned Costs
Year Ended December 31, 2023**

(Continued)

Section II – Financial Statement Findings

Reference Number	Finding
	No matters are reportable

**The Community Firm dba Community Economic Defense Project
Schedule of Findings and Questioned Costs
Year Ended December 31, 2023**

(Continued)

Section III – Federal Award Findings and Questioned Costs

Reference Number	Finding
	No matters are reportable

The Community Firm dba Community Economic Defense Project
Summary Schedule of Prior Audit Findings
Year Ended December 31, 2023

Reference Number	Finding	Status
No matters are reportable		

Carla Caltabiano

Contact Center Manager

8181 Jasmine St
Dupont, CO 80024
(303) 472-8300
carlacaltabiano@gmail.com

EXPERIENCE

Community Economic Defense Project, Denver— CARE Center Supervisor

2022 - PRESENT

Manage daily contact center performance and strategy while coordinating with CARE leadership to ensure our teams are fully supported in their efforts to meet client needs.

Elevation Connect, Greenwood Village— Team Lead 2021 - 2022

Managed team of remote agents while mentoring new team leads. Crafted an internal website to centralize knowledge over multiple accounts.

Bright Horizons, Broomfield— Workflow Management Supervisor

2016 - 2019

Created and monitored processes implemented by a team of workflow coordinators to efficiently distribute client workload across available internal resources.

Education Sales Management, Xerox, Highlands Ranch— Operations Manager

2010 - 2016

Designed and implemented scripting and dialing strategies as coordinated with clients to meet enrollment goals. Managed all contact processes and training for agents and assistant team leads.

EDUCATION

Metro State University of Denver, Denver— Associate of General Studies

2006- 2010

Major - Behavioral Science

SKILLS

Problem Solving

Data Analysis

Change Communication

Teambuilding

Contact Center Technology

Public Speaking

REFERENCES

Aly DeWills-Marcano

Director of Customer Care, CEDP

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Christina Garcia

Chief Program Officer, CEDP

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Aly DeWills-Marcano

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www.linkedin.com/in/aly-dewills-marcano/

Career Experience

Community Economic Defense Project

Director of Customer CARE

February 2024 – Present

Promoted to lead the CARE Center, an innovative contact center originally serving the Colorado Emergency Rental Assistance Program during COVID-19, now a longterm program supporting multiple housing assistance programs across Colorado. Oversee all operations, reporting, and strategy across a 23-person team serving thousands of clients statewide.

- Supervise 3 mid-level supervisors and 20 agents, maintaining strong performance and exceptional staff retention in a fast-paced environment.
- Coordinate across departments to support housing stability efforts and ensure effective client outcomes.
- Lead reporting and data analysis; develop and present detailed performance reviews and impact reports.
- Approve and implement all processes and documentation; drive continuous improvement of client support systems.
- Administer call center software systems including HubSpot, Dialpad, and Slack, ensuring efficient case management and communication.
- Sustained extremely high CSAT scores for three consecutive years while adapting to evolving program goals and funder requirements.
- Retained over 50% of staff from the original 2022 team, fostering a stable, mission-driven workplace culture.

CARE Center Manager / Phone Team Manager

July 2022 – January 2024

Managed the initial launch and operation of Colorado's emergency rental assistance call center, which later evolved into a permanent program.

- Co-lead the development and launch of the call center in four weeks, serving over 4,000 clients per week.
- Built the call center infrastructure, including processes, software systems, and staffing.
- Hired and managed a team of 18 agents providing phone and chat-based client support.
- Implemented systems like HubSpot, Dialpad, and Slack to support tracking and internal

documentation.

- Designed training, coaching, and performance management systems to support staff handling crisis situations.

United States House of Representatives

Deputy District Director / Constituent Services Manager

December 2019 – June 2022

- Built district office operations from the ground up for Congressman Jason Crow.
- Led a team handling over 3,000 constituent cases involving federal agencies.
- Developed scalable systems for casework, training, auditing, and event planning.
- Created a workforce management policy that was later implemented into Federal law.
- Facilitated national trainings for service academy nomination systems.
- Planned and executed the Congressman's inaugural job fair with 75 employers and over 1,000 attendees.

Aurora Residents for Transparency and Transformation (ARRT)

President of the Board (Volunteer)

January 2018 – December 2022

- Led a nonprofit advancing local transparency, accessibility, and civic engagement.
- Directed board meetings, planning sessions, and public-facing campaigns.
- Created accessible infographics and educational resources for local elections and initiatives.

Greystone Technology Group

Customer Service Experience Manager

January 2011 – August 2015

- Redeveloped support workflows as company transitioned to service model.
- Managed a 12-person team delivering IT and customer service.
- Designed dispatch and SLA systems that enabled 300% client growth.
- Created ConnectWise training program and onboarding processes.
- Led hiring of 90 employees in two years and helped develop HR programs.

Additional Experience

Assistant Manager, Greenway Plaza Roasters (2009–2011)

Lease Office Administration, AARP Colorado/Divided We Fail (2007–2009)

Skills & Technical Profile

Core Platforms:

HubSpot (CRM, case management, chat systems), Dialpad (Contact centers, QA/auditing), SalesMsg (SMS outreach), Slack (internal comms), Google Workspace (Docs, Sheets, Slides), Microsoft Office (reporting & data visualization)

Additional Tools & Experience:

Salesforce, Zendesk, Freshdesk, JIRA, Trello, Asana, Monday.com, Confluence, MailChimp, Hootsuite, Basecamp, ConnectWise, Fireside IQ, Microsoft Office Suite

Operational Strengths:

Call Center Operations & Systems Administration • Cross-Departmental Coordination • KPI Development & Performance Reporting • Program Design & Process Improvement • Staff Coaching, Retention & Performance Management • Government Funder Reporting & Stakeholder Communication • Quality Assurance & Client Outcome Tracking • Trauma-Informed, Equity-Centered Leadership

Education & Certifications

General Educational Development Diploma (GED), 2003

Event Planning & Floral Design Certification, 2007

References

Kirby Rising

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Christina Garcia

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KIRBY RISING

Kirbyrising@gmail.com • (303) 884-7447

<https://www.linkedin.com/in/kirby-rising/> • Golden, CO

VICE PRESIDENT OF PROGRAM OPERATIONS

Resourceful, strategic leader with over 15 years of progressive leadership and operational management experience with success in planning and implementing programs that improve organizations through change management, leadership, and process improvements. Oversee leadership programs. Subject matter expert of organizational operation management principles, methods, and procedures. Developed supportive culture for staff and students providing ongoing feedback and encouraging participation in professional and student development activities.

Clifton Top Five Strengths: Incluser | Arranger | Responsibility | Ideation | Futuristic

AREAS OF EXPERTISE

- Strategic Leadership
- Training and Development
- Program Development
- Change Management
- Contract Negotiation
- Operations
- Communication
- Relationship Management
- Curriculum Development
- Student Experience
- Outreach
- Business Start-up

CAREER EXPERIENCE

Community Economic Defense Project (CEDP), Denver, CO

VP of Program Operations

February 2021 - Present

Within one year, obtained funding, led, and created four new program infrastructures focused on eviction and foreclosure prevention (50,000 contacts per month), connecting clients to funding, and connecting individuals to broadband in collaboration with other programs. Oversee 5 annual budgets: \$515k, \$684k, \$1.5 million, \$1 million, and \$12.7 million with client payments. Directly supervised 7 program supervisors, multiple teams to include: Information Technology and Help Desk teams, CEDP Call Center, Training and Development, Safety, Foreclosure Prevention and 35 indirect reports.

- Partner to write grants and develop budgets for programs; awarded highest funding country-wide for 1 program.
- Develop Key Performance Indicators and Metrics for programs; monitor and evaluate processes for reporting.
- Create training materials for new hires and continued education for advocates.
- Develop and implement policies, procedures, processes and applications; guide community outreach programs.
- Research and complete contracts with all on-demand translation services and a resource database.
- Present bi-weekly presentations to state government on program quantitative and qualitative data effectiveness.
- Project, program and team lead for technology contracts, multiple grants/requests for proposals, and dispatch/triage teams within rental assistance programs, and cell phone program.
- Provide over 1 million per month in prevention funds to clients.

Denver Scholarship Foundation (DSF), Denver, CO

Campus Advisor – Metropolitan State University

December 2020 – February 2021

Managed over 200 scholarship recipient caseloads across 4 different programs; served as a member of 2 committees.

- Partnered with students to proactively resolve issues using via email, phone, virtual and in person.
- Provided student career advisement and workshops; connected students to programs and resources.
- Coordinated course registration, degree audit processes and made recommendations.
- Served as student and faculty liaison.
- Led and coordinated meetings and activities for staff.

Regis University, Denver, CO**Sr. Assistant Director of Admissions – Traditional Transfer****September 2016 – October 2020**

Recruited, advised, and enrolled prospective transfer students into the university while adapting to new recruitment challenges. Provided leadership for 4 Assistant Directors/Admissions Counselors. Influential student advocate.

- Developed strategic enrollment plan to increase community college enrollment; increased application to deposit by 19% to 34% (target was 22%) the first year and 34% to 40% (target was 37%) the second year.
- Advocated for student transfer orientation, transcript evaluation, and academic advising.
- Specialized in international transfer students and transfer credit by NACES approved organizations.

Harrison Gray Search & Consulting, Denver, CO**Director of Executive Search****March 2016 – August 2016**

Networked and partnered with companies to identify qualified candidates for over 10 contingency search agreements vacancies.

- Cold called 50 prospective companies per day marketing products and services securing 2 contracts per month.
- Performed initial interviews for qualified candidates as part of the recruitment and selections process.
- Prepared candidates for interviews throughout the hiring process.

Guild Education, Denver, CO**Education Consultant (Contract)****February 2016 – May 2016**

Consulted new education startup company with Admissions, Student Services, and Training department full set-ups.

- Coordinated phone system and customized Salesforce Customer Relationship Management (CRM) implementation.
- Developed Admissions processes and procedures for students; developed training plans for each department.
- Performed initial outreach efforts, and partnered with universities during the enrollment process.

Jones International University, Centennial, CO**Director of Student Services & Admissions****September 2012 – January 2016**

Delivered leadership and support to multiple departments. Performed budget management and program oversight. Managed two managers, two trainers, and 30 indirect reports in dual leadership role.

- Developed strategic enrollment plan to increase and maximize enrollments, and guided marketing activities to recruit and retain eligible students.
- Reduced headcount by 25% through department merger successfully implementing 6-week transition training program.
- Increased student retention by 2% through organizational change streamlining services.
- Performed daily and monthly enrollment forecasting used to develop and maintain university budgets.
- Achieved 23% increase in completion rate for new student orientation; implemented mandatory requirements.
- Collaborated with marketing team on lead management and data analytics conversion rates.
- Created and implemented one stop shop call center model for students increasing efficiency of institution.

Manager of Student Services**August 2011 – August 2012**

Provided quality student programs and services. Guided strategic program initiatives. Managed a team of 30 Student Support Counselors.

- Increased Student Support Counselor talk time by 17% and decreased course drops by 5% through proactive modeling and encouraged student outreach.
- Delivered change management achieving long-term department culture change improving the student experience.
- Networked with campus programs: Admissions, Financial Aid, and Registrar to support student services.

Student Support Counselor Team Trainer**February 2010 – July 2011**

Managed training and development in newly created role. Developed team and individual training and performance plans.

- Developed, facilitated, and implemented department customer service and professional development curriculum.
- Consulted leadership teams, conducted needs assessment, and created training materials: new hire, performance, and e-learning programs.
- Provided group trainings, one-on-one learning, and call reviews increasing retention and improving performance.
- Participated in group interviews providing candidate recommendations for recruitment and selection process.

EDUCATION**Development Practice/Masters | May 2022**

Regis University – Denver, CO

Education/Bachelor of Science | May 2007

Chadron State College – Chadron, NE

Executive Training Program | 2014

Jones International University – Centennial, CO

VOLUNTEER EXPERIENCE

Research Assistant | Regis University | October 2020 – March 2021

Social Media Engagement Intern | TheEduCtr | October 2020 – December 2020

Team in Training | Leukemia & Lymphoma Society | 2013

TECHNICAL EXPERIENCE

Hubspot | Dialpad | Findhelp | Microsoft Office Suite | Google Suite | Bamboo HR | Rippling HR | Salesforce | Ellucian | Campus VUE | Boostlingo – Language Translation Software | Sharefile | 15Five | Guru | Relias | Technology Contracts

AFFILIATIONS

Board Member | Rocky Mountain Microfinance Institute | November 2022 – December 2024

Member | Colorado Nonprofit Association Member | September 2020 - Present

Member | Posner Center for International Development | August 2019 – Present

References

Angie Maze

Vice President Customer Success and Experience, ETQ

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Adam Kail

Chief Executive Officer, Harrison Gray Search and Consulting

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616-916-0231

Sarah Engel

Former Director of Admissions, Regis University

sarahengel2010@gmail.com

303-458-4938

Jayda Zeller

Denver, CO

WORK EXPERIENCE

Cybersecurity and IT Support Specialist

Community Economic Defense Project

Denver, CO

December 2024 - Present

- Developed security roadmap by conducting a comprehensive baseline assessment of the organization's IT and security posture.
- Researched, evaluated, and deployed key security and operational tools such as EDRs, SIEMs, RMMs, MDMs, VPNs, and core networking infrastructure to establish a robust architecture.
- Audited access management, control systems, and permission levels to ensure principle of least privilege and regulatory compliance.
- Led cost-benefit analysis and budget alignment to prioritize security investments.
- Rolled out company-wide security training awareness programs.
- Presented technical findings and strategic recommendations to executive leadership, influencing security initiatives.
- Authored and maintained critical IT policies such as Acceptable Use (AUP), Business Continuity (BCP), Disaster Recovery (DRP), Identity and Access Management (IAM), and Incident Response (IR) plans.
- Regularly assessed new and evolving security needs of the company and implemented fixes and advancements.

IT manager

Denver, CO

April 2023 - December 2024

- Conducted security testing, including PCI compliance assessments and social engineering engagements to identify vulnerabilities in infrastructure and staff awareness resulting in a 43% pass rate increase.
- Led risk analysis assessments, developing business continuity plans and implementing robust data backup policies.
- Monitored network traffic for indicators of compromise (IOCs), unusual login activity, and other suspicious behavior, providing actionable mitigations.
- Presented security findings and IT strategy proposals to executive leadership, recommending best practices to protect the organization.
- Ensured compliance and best practices from ISO 27001 and SOC 2.
- Engaged with a diverse set of stakeholders from technical and non-technical backgrounds, ensuring alignment on cybersecurity priorities.
- Collaborated with cross-functional teams to evaluate network and device configurations, identifying insecure protocols and recommending system hardening resulting in 28% fewer vulnerabilities.

Genius Bar Technical Lead

Broomfield, CO

July 2022 - April 2023

- Managed end-to-end troubleshooting and repair of Apple devices, ensuring 98% customer satisfaction.
- Led a team of technicians, ensuring efficient allocation of tasks and reducing customer wait time
- Tracked and analyzed repair data, identifying trends and implementing corrective actions, improving repair quality.
- Contributed to cross-departmental initiatives, collaborating with store management to enhance customer service operations.

- Demonstrated competency in advanced troubleshooting skills.
- Devised systems and workflows to increase productivity by 55%.
- Collaborated with team members on new procedures to generate more labor hours and raise customer satisfaction scores.
- Organized time to appropriately prioritize repairs based on sensitivity, deadlines, and workload.
- Trained clients on best security practices after infections.

EDUCATION

Bachelor of Cybersecurity and Information Assurance

Expected August 2025

TECHNICAL CERTIFICATIONS

CompTIA A+ | CompTIA Network+ | CompTIA Security+ | CompTIA CySA+ | CompTIA Pentest+ | CompTIA Project+ | ISC2 SSCP | ITIL | Linux Essentials

SKILLS

Documentation, reporting, technical leadership, qualitative and quantitative risk assessment, Jira, SentinelOne, NinjaOne, PCI-DSS, ISO standards, security training, network and security analysis, vulnerability management

REFERENCES

Kirby Rising
VP of Program Operations, CEDP
kirby.rising@cedproject.org
+1 (303) 884-7447

Christina Garcia
Chief Program Officer, CEDP
christina.garcia@cedproject.org
+1 (720) 998-8916

Zach Neumann
Executive Officer, CEDP
zach@cedproject.org
+1 (832) 283-2494

Miles Tonini

Work Experience

Community Economic Defense Project

2022-Current

Provide support to 200 employees at multiple facilities and remote locations

Managing and building out Hubspot CRM including 54 separate pipelines to support all grant programs

Managing all remote systems

Managed IT build-out and development of two locations, including installation of router, firewall, switches, and wireless

Folium Biosciences - Senior IT Manager

2018-2020

Company previously managed all data and email on the gmail platform and used personal computers

Moved company to O365 (previously managing all data and email on gmail platform)

Hired and trained all IT employees

Brought two new facilities online with a combined total of 125,000 sqft

Set up Salesforce to manage workflow for Sales, Fulfillment, QA/QC, Sales Support, Shipping and vendors

Set up and maintained all systems for all three Folium facilities including

- Networking - Routing, firewalls, switches, servers, and wireless

- Servers - AD, VMs, Print, Storage, Security/Cameras

- Security - Badging, Cameras

Samtec Microelectronics - Support Coordinator

2013-2018

- Provided help desk support for 250 total employees.
- Daily support of three out-of-state facilities with scheduled onsite visits.
- Managed and mentored team personnel
- Prioritized help ticket requests for all tickets T2 and above
- Worked on development of new building, including installation of router, firewall, switches, wireless, and IDFs
- Manage all systems at local office as well as desk visits to employees
 - Mitel Phone system, Verizon and ATT business accounts
 - Active Directory, permissions, email groups
 - Network management - monitoring, troubleshooting, implementation, wireless

- Able to code in Cisco, Brocade, and Foundry devices
- Inventory management and purchasing
- Security - Badging, cameras
- Server and VM management
- Experience with Exchange, O365, SCCM, JIRA, Active Directory, Group policy, Windows 12r2, Mitel, and troubleshooting production equipment

Samtec, Inc. - New Albany, IN (Corporate office)

2011-2013

- Provided help desk support to 1,000 employees
- Work included but was not limited to - Switch management, wireless management, off-

site visits to facilities/residences, cell phone account management, IP phone system management, network troubleshooting, and general tickets

- Worldwide digital signage implementation

Education

Indiana University Southeast - Information Systems

References

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ELAINE FRENCH

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WORK EXPERIENCE

- COMMUNITY ECONOMIC DEFENSE PROJECT, Remote
Senior Development & Data Analyst
Development & Data Analyst
April 2025 - Present
May 2024 - March 2025
 - Created automated scripts in Python to analyze funding and operational datasets, cutting reporting time by 50% and improving data quality for compliance and funding proposals.
 - Built scalable data pipeline tools that integrated data from multiple CRMs and internal systems, enabling deeper visibility into cross-program performance and resource allocation.
 - Collaborated closely with non-technical staff to gather reporting requirements, redesign data infrastructure, and deliver dashboards and outputs aligned with stakeholder needs.
 - Regularly distilled complex data into clear narratives for strategic planning and external reporting.
- CAMPAIGN FOR OUR SHARED FUTURE, Data & Systems Coordinator, Remote
April 2022 - Dec 2023
 - Administered and developed Salesforce solutions including automation, custom reports, security and end-user support to streamline operations.
 - Managed integrations across Salesforce, EveryAction, and additional digital tools, resolving data sync issues and ensuring system continuity.
 - Designed and deployed reporting dashboards to provide real-time visibility into program and campaign metrics, enabling faster, data-informed decision making for a growing startup.
- CHILDREN INTERNATIONAL, Monitoring & Evaluation Coordinator, Little Rock, AR
October 2019 – Feb 2022
 - Developed data management system processes and documentation using Microsoft Dynamics, Excel, and Google Sheets, writing guidelines and protocol, and facilitating implementation and learning.
 - Led program reflection project including managing a budget, facilitating virtual and in-person sessions, leading a project team, creating a project timeline and following through to reporting deliverables.
- OUR HOUSE, Grants & Evaluation VISTA, Little Rock, AR
August 2018 – August 2019
 - Collaborated with developers to implement a custom CRM platform, requiring creative problem solving and effective communication.
 - Drove new tool adoption of Tableau for data analysis and visualization in quarterly reporting.

TECHNICAL SKILLS

Data & Analytics: Python, SQL, Advanced Excel
CRM Platforms: Salesforce administration & development, Microsoft Dynamics, HubSpot
Data Engineering: Data modeling, database design, data migration, quality management, and data security
BI & Visualization: Strong experience with data storytelling and insight delivery using dashboards & reports

EDUCATION

- UNIVERSITY OF COLORADO, Boulder, CO
Bachelor of Computer Science | GPR 4.0
Graduation August 2025
 - Relevant Coursework: Design & Analysis of Database Systems, Data Science, Machine Learning
- TEXAS A&M UNIVERSITY, College Station, TX
Master of International Affairs | 3 + 2 Joint Degree Program | GPR 3.9
Bachelor of Arts in International Studies | Magna Cum Laude
May 2017

REFERENCES

Will Ritter	Head of Integrated Care and Strategy, CEDP	will.ritter@cedproject.org +1 (312) 636-5758
Kirby Rising	VP of Program Operations, CEDP	kirby.rising@cedproject.org +1 (303) 884-7447
Christina Garcia	Chief Program Officer, CEPD	christina.garcia@cedproject.org +1 (720) 998-8916

ELAINE JACKSON (she/her)

CONTACT

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esjackson406@gmail.com
Westminster, CO
linkedin.com/in/elainejackson

SKILLS

PROFESSIONAL

- Teaching and Adult Learning
- Coaching
- Training and Development
- Facilitation and Presentation skills
- Goal Setting and Action Planning
- Curriculum Development and Design
- Strategic Planning
- Team Development
- Attention to Detail
- Google & Microsoft Suite

EDUCATION

CERTIFIED PROFESSIONAL COACH

Institute for Professional Excellence in Coaching (iPEC)
2022

MASTER OF ARTS

Elementary Teaching
University of Washington
2011-2012

BACHELOR OF ARTS

Early Childhood and Family Studies
University of Washington
2008-2011

OBJECTIVE

Learning and development professional with experiences in coaching, facilitation and adult learning practices. Looking to apply my facilitation and coaching skills to support employees in reaching their professional goals.

RELEVANT EXPERIENCE

LEARNING & DEVELOPMENT (L&D) LEAD

Community Economic Defense Project (CEDP) | JUNE 2022- Present

CEDP was a response to the COVID 19 pandemic to keep Coloradans housed during a spike in evictions and decrease in income. CEDP continues services such as rental, homeowner assistance and more.

- Created and facilitated 6 cohorts of a 10 week Leadership Program to 70+ employees
- Oversaw onboarding process and program to 150+ new hires
- Designed 20+ trainings and facilitated 60+ trainings to employees including Implicit Bias, Person First Mindset, Effective Feedback Techniques
- Collected data for program improvement and scaling of training programs
- Launched and maintained Relias Learning Management System (LMS) with migration to Absorb LMS
- Maintained L&D budget across various initiatives and programs
- Certificated Trainer: Question Persuade Refer (suicide prevention) Gatekeeper Training
- Participant in Colorado Immigrant Rights Coalition, Immigrant Know Your Rights Train the Trainer
- Designed internal mentorship program with 16 total participants within the first quarter of program launch

FOUNDER & FACILITATOR

Best Self Facilitation | SEPTEMBER 2023-Present

The business I founded helps individuals and teams to be their best selves through workshops, retreats and written reflection tools.

- Designed and development of self development workshops and self development workbook
- Facilitated team development workshops for 10+ teams including Sims Fayola Foundation, CAMP Collective and Denver Public Libraries
- Facilitation of 6 month long contracted facilitation for 15Forever, a partnership with Youthroots and Community Foundation Boulder
- Design and facilitation of team retreat, focused around team connection, for Reading Partners Colorado
- Design and implementation of Strategic planning and 3 year goal-setting for The Conflict Center

SOCIAL EMOTIONAL AND INSTRUCTIONAL COACH

City and County of Denver & Jefferson County Human Services | APRIL 2019-JUNE 2022
The City of Denver implemented the SEAL (Social Emotional and Academic Learning)

VOLUNTEERING

DENVER METRO CHAMBER OF COMMERCE IMPACT DENVER

Leadership Coaching

January 2025 - June 2025

READING PARTNERS COLORADO

Tutor advisor and reading partner

August 2024 - June 2025

CITY & COUNTY OF DENVER MAYOR'S YOUTH COMMISSION

Adult commissioner

March 2020 - June 2023

PEACE CORPS SOUTH AFRICA

Grade 5 Teacher

June 2017 - December 2017

REFERENCES

Karla Rivas

VP of People, CEDP

karla.rivas@cedproject.org

+1 (303) 235-8283

Kirby Rising

VP of Program Operations, CEDP

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+1 (303) 884-7447

Zach Neumann

Executive Officer, CEDP

zach@cedproject.org

+1 (832) 283-2494

initiative, coaching elementary schools to deliver SEAL programming. Jefferson County Head Start uses wrap-around services to empower families to be healthier and self reliant.

- Increased use of SEAL practices in 9 learning spaces through coaching cycles
- Lead in creation of after school curriculum and designed 40 SEAL lesson plans
- Designed 10 and facilitated over 30 professional development workshops
- Collaborator and facilitator of diversity, equity and inclusion content
- Completion of green belt and black belt process improvement courses
- Improved CLASS scores and teaching practices for 8 teachers with practice based coaching cycle
- Facilitation of five trainings on effective teaching practices for 40+ teachers

PROGRAM MANAGER

Girls Inc of Denver Metro Chamber | FEBRUARY 2018- APRIL 2019

Girls Inc. inspires all girls to be strong, smart and bold through research based programming and mentoring while building skills, advocacy and connection with one another.

- Designed and implemented research-based programming during the school year and summer
- Managed, coached and supported a team of 5 program staff to deliver high quality programming
- Led outreach and relationship-building efforts, securing partnerships with 8+ elementary schools across the region
- Oversaw program logistics, including scheduling, budgeting and daily operations, to ensure impactful program delivery
- Collected and analyzed participant data to track outcomes and inform continuous improvement
- Recruited, vetted and managed contacts for external program vendors

ELEMENTARY AND MIDDLE SCHOOL TEACHER

Albert Einstein Academy and Prepa Tec Middle School | AUGUST 2015- JUNE 2017

Serving a largely Latinx population in East Los Angeles, Prepa Tec is an IB (International Baccalaureate) school, nurturing 21st century learners. Albert Einstein STEM school serves a diverse population of students, grades K-6 in Beverly Hills.

- Facilitated learning for students with culturally responsive and inquiry based lens
- Designed engaging and socially conscious lessons for students in various subjects
- Gathered and tracked feedback to increase youth voice and engagement in their learning
- Tailored teaching approach as needed for over 75 students in one school year

CLASS ASSESSMENT LEAD

University of Washington (UW) | JUNE 2012-AUGUST 2015

The Childcare Quality and Early Learning Center for Research and Professional Development (CQEL) provides training and research on the quality of early learning in Washington State (Early Achievers).

- Facilitated 16 trainings for over 150 participants on the Classroom Assessment Scoring System (CLASS) tool
- Maintained CLASS anchor status for Washington State with 97% reliability average
- Collaborated with team to design a hybrid Family Child Care CLASS assessment
- Completion of UW Strategic Leadership Program
- Managed team of 4 data collectors

SAM GILMAN

1200 Vine St, 6F • Denver, CO 80206 • (202)-841-3180 • sam.gilman44@gmail.com

- EXPERIENCE**
- COMMUNITY ECONOMIC DEFENSE PROJECT (CEDP):** *Co-Founder & Co-CEO*, Denver, CO Mar. 2020 –
- Co-founded one of Colorado’s largest anti-poverty orgs & law-firms in CO, with 160 staff
 - CEDP offers integrated resource navigation financial assistance, legal aid, and advocacy responses to eviction, foreclosure, displacement, predatory towing, natural disasters, and other family financial issues (www.cedproject.org)
 - Our team has served more than 40,000 Coloradans, 74% identify as BIPOC / Latine, in 45 counties across CO
 - Delivered more than \$190 million in emergency assistance to people facing eviction, foreclosure, and predatory tows
 - Published key research cited to justify the 2020 CDC eviction moratorium and led public campaigns for moratoria
 - Passed 12 state laws that increased tenant protections, capped the costs of lifesaving medication, prohibited predatory business practices and increased funding for social services
 - Advise state government on regulation, policy, and implementation of renter, homeowner, and public benefit programs
 - Manage state and local budgetary advocacy with elected officials and community stakeholders
 - Designed and lead housing stabilization fund featured as a best practice by Urban Institute, HUD, and White House
 - Advised officials at Treasury, HUD, and in CA, NV, OR, & CO on policy response to pandemic eviction crisis
 - Inform public narrative on wealth stripping, displacement, and extraction through writing and interviews
 - Quoted in *Washington Post*, *Denver Post*, *CBS*, *Newsweek*; research cited by *New York Times*, *CNN*, *NPR*, *Bloomberg*
 - Raised \$200+ million in funding and managed CFO duties for growing organization on interim basis
- COLORADO ATTORNEY GENERAL’S OFFICE:** *Law Clerk*, Denver, CO Feb. 2019 – Mar. 2020
- Provided remote and in-person support for investigation and litigation against landlord for alleged UDAP violations, including interviewing tenants and former employees, reviewing discovery, conducting quant analysis, writing deposition questions, drafting correspondence with opposing counsel, and formulating settlement terms
 - Wrote pre-trial motion filed with the Colorado District Court in consumer fraud contempt hearing
 - Wrote brief for AG Weiser on relevant data privacy issues before pre-subpoena meeting with a Fortune 1000 company
- GUILD EDUCATION:** *Sr. Manager of Strategy & Special Projects*, Denver CO Feb. 2017 – Jun. 2018
- First strategy hire; led analytics, designed and managed Fortune 500 implementations for the ops team, and ran special projects at ed-tech startup that helps working adults go back to school and manages corporate education benefits
 - Led analytics for a \$40 million Series C fundraise and \$21 million Series B fundraise
 - Built and managed Guild’s first business intelligence, analytics, and lead-scoring systems (one direct report)
- MCKINSEY & CO.:** *Jr. Engagement Manager & Business Analyst*, Denver, CO Sep. 2015 – Jan. 2017
- Led 3-person team to develop strategic plan for CareerWise, Colorado’s statewide apprenticeship system
 - Ran advanced analytics for a consumer lender; conducted customer segmentation and market survey analysis
 - Consultant lead for large manufacturer’s chemical purchasing negotiations, leading to \$14MM in savings
- COMMON SENSE ACTION (CSA):** *Co-Founder & CEO*, Washington, DC; Providence, RI Sep. 2012 – Aug. 2015
- Co-founded, ran, and led a think-tank & advocacy org. with 40 chapters in 20 states
 - Affiliated with the Bipartisan Policy Center; jointly devised and advanced a national millennial policy agenda
 - Registered and mobilized 3,500 voters for 2014 midterms and mobilized 10,000+ voters during the 2014 cycle
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- EDUCATION**
- HARVARD LAW SCHOOL**, J.D. 2022
- Honors: Graduated Cum Laude
- Activities: Harvard Legal Aid Bureau (Student Attorney); Harvard Tenant Advocacy Project (Student Attorney) Prof. Christine Desan, Research Assistant (public banking); *Harvard Civil Rights-Civil Liberties Journal*
- HARVARD KENNEDY SCHOOL OF GOVERNMENT**, MPP 2022
- Honors: John F. Kennedy Fellowship (awarded for “academic ability and professional distinction”)
Manuel C. Carballo Memorial Prize: best paper evaluating programs serving historically marginalized groups
- Activities: Dr. Dipayan Ghosh, Research Assistant (data privacy law and policy)
- BROWN UNIVERSITY**, B.A. 2015 *magna cum laude* in Public Policy and History
- Honors: Rhodes & Marshall Scholarship Finalist
Frederick Lippitt Prize for Public Service
Khemka Scholar: Global Educational Leadership Foundation (India)
- Activities: Alvarez High School, Student Teacher
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- SKILLS** Language: Fluent Spanish; analytics and data: fluent Excel, basic R (regressions and simple machine learning models)
- INTERESTS** Economic defense, housing markets, algorithmic justice, Abraham Lincoln, running, baseball, improv, board games
-

SAM GILMAN

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PUBLICATIONS

ACADEMIC JOURNAL ARTICLES

- *Ending Evictions: The Lived Case for Replacing the Violence of Eviction with the Humanity of a Safety Net* 49.1 JOURNAL OF AFFORDABLE HOUSING 52 (2023).
- *Proliferating Predation: Reverse Redlining, the Digital Proliferation of Inferior Social Welfare Products, and How to Stop It*, 56 HARVARD CIVIL RIGHTS-CIVIL LIBERTIES. LAW REVIEW 169 (2021), <https://harvardcrcl.org/wp-content/uploads/sites/10/2021/04/gilman.pdf>.
- *The Return on Investment of Pandemic Rental Assistance: Modeling a Rare Win-Win-Win*, 18 INDIANA HEALTH LAW REVIEW 293 (2021), <https://journals.iupui.edu/index.php/ihlr/article/view/25459>.
- *A Novel Tool for Patient Data Management in the ICU – Ensuring Timely and Accurate Vital Data Exchange Among ICU Team Members*, J. OF MEDICAL INFORMATICS (2020) (with Matt Burdumy, Omar Lattouf, Noah Newmann, and Mekeleya Yimen), <https://pubmed.ncbi.nlm.nih.gov/33049479/>.

THINK TANK REPORTS AND PUBLICATIONS

- *Using Community Income Levels to Help Tenants Get Emergency Rental Assistance*, HARVARD JOINT CENTER FOR HOUSING STUDIES (Oct. 28, 2021), <https://www.jchs.harvard.edu/blog/using-community-income-levels-help-tenants-get-emergency-rental-assistance>.
- *WITH FEDERAL MORATORIUM EXPIRING, 15 MILLION PEOPLE AT RISK OF EVICTION* (Jul. 27, 2021) (with Zach Neumann, Tim Shaw, Jacqueline Woo, & Katherine Lucas McKay), <https://www.aspeninstitute.org/publications/with-federal-moratorium-expiring-15-million-people-at-risk-of-eviction/>.
- *EMERGING BEST PRACTICES FOR COVID-19 EMERGENCY RENTAL ASSISTANCE PROGRAMS*, ASPEN INSTITUTE (Dec. 2020) (with Zach Neumann & Katherine Lucas McKay), <https://www.aspeninstitute.org/wp-content/uploads/2020/12/Aspen-CEDP-Rental-Assistance-Presentation.pdf>.
- *THE COVID-19 EVICTION CRISIS: AN ESTIMATED 30-40 MILLION PEOPLE IN AMERICA ARE AT RISK*, ASPEN INSTITUTE (Jul. 2020) (with Emily Benfer, David Bloom Robinson, Stacy Butler, Lavar Edmonds, Katherine Lucas McKay, Zach Neumann, Lisa Owens, Neil Steinkamp & Diane Yentel), <https://www.aspeninstitute.org/blog-posts/the-covid-19-eviction-crisis-an-estimated-30-40-million-people-in-america-are-at-risk/>.
- *National Eviction Risk Projections*, ASPEN INSTITUTE (Aug. 10, 2020), <https://www.aspeninstitute.org/publications/national-eviction-risk-projections/> (with Zach Numan and Katherine Lucas McKay).
- *20 Million Renters Are at Risk of Eviction; Policymakers Must Act Now to Mitigate Widespread Hardship*, ASPEN INSTITUTE (Jun. 19, 2020) (with Zach Neumann & Katherine Lucas McKay), <https://www.aspeninstitute.org/blog-posts/20-million-renters-are-at-risk-of-eviction/>.
- *Nevada Eviction Risk*, GUINN CENTER (Jun. 10, 2020).
- *Reducing Eviction Risk in Colorado*, BELL POLICY CENTER (May 27, 2020) (with Marco Dorado), <https://www.bellpolicy.org/wp-content/uploads/052820-CEDP-CO-Eviction-Write-Up-VShare.pdf>.