

SECTION ONE

OVERVIEW OF APRIO LLP

APRIO AT A GLANCE

 **450+**
Team Members

 **60**
Partners

 **6** Industry
Specialties

 **40+**
Client in
Countries

 **25+**
Languages
Spoken

 **22**
Services

25% of the firm is foreign born



BREADTH OF SERVICES

 **Advisory**

 **Assurance**

 **Tax**

 **Private Client**

SPECIALTY SERVICES

Behavioral Economics	Cloud Accounting	Litigation Support & Forensic Accounting
Blockchain Accounting & Tax	Data Analytics	Succession Planning
Business Technology Consulting	Financial Consulting	Tax Credits & Incentives
Business Valuation	International	Transaction Advisory



A RECOGNIZED LEADER

Aprio has been recognized as a
 "Best of the Best Accounting Firm" in the United States.
 We rank in the top 100 accounting firms in the nation
 and have been acknowledged as a
 "Best Place to Work."



"Best of the Best Accounting Firm"
2013-2017



GA's Best Full Service Accounting Firm
2012-2016



Top 100 Accounting Firm
1997-2019



Atlanta Journal Constitution
"Top Work Place"
2017, 2018, 2019

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SECTION TWO
Background of Dr. Troy D. White

BACKGROUND OF DR. TROY D. WHITE



Director, Public and Affordable Housing
 O: 770.353.5308
 E: troy.white@aprio.com
 www.Aprio.com

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BACKGROUND OF DR. TROY D. WHITE

Dr. White has over 25 years of experience of which 20 years has been working at several Housing Authorities where he has managed funding in excess of \$300 million and oversaw 350 employees. Additionally, he brings expertise in affordable housing development, finance, human services, economic development, compliance, community engagement and facilities management. Dr. White has also played an integral role at these agencies by improving the efficiency of operations as well as maintaining or improving these agencies SEMASP/PHAS performance status with HUD.

Education:

Capella University, MN
Doctor of Public Administration - Graduated with Distinction

University of Connecticut, CT
Master of Business Administration - Majored in Finance

Southern Connecticut State University, CT
Bachelor of Science - Business Administration – Majored in Management



BACKGROUND OF DR. TROY D. WHITE

Housing Authorities worked at:

- ❖ Housing Authority of the City of Atlanta, GA, (MTW Agency)
- ❖ Broward County Housing Authority, FL
- ❖ Housing Authority of the City of Ansonia, CT
- ❖ Charlotte Housing Authority, NC (MTW Agency)
- ❖ Housing Authority of the City of Meriden, CT
- ❖ Saginaw Housing Commission, MI
- ❖ Philadelphia Housing Authority, PA
- ❖ Housing Authority of the City of New Haven, CT

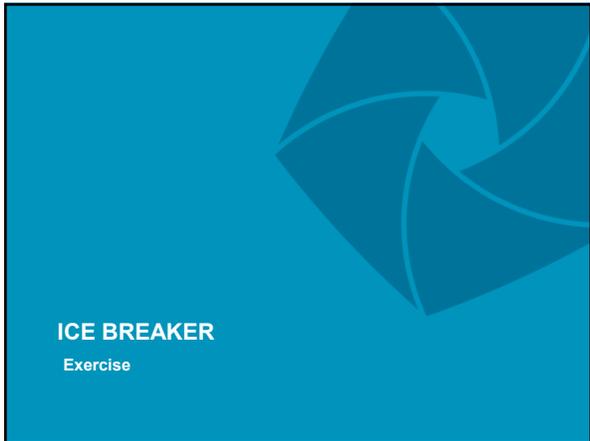


ROLE AT APRIO

Role at Aprio:

As Public and Affordable Housing continues to face a growing number of challenges, Dr. White has launched a suite of consulting services to help transform the finance function of these organizations. He works with public and affordable housing agencies to improve operational efficiencies, program compliance, fiscal health, enhance the quality of service delivery, and financial sustainability of agencies.





ICE BREAKER
Exercise



SECTION THREE
FIRM'S APPROACH

FIRM'S APPROACH

Aprio's approach for strategic planning is a collaborative approach. The process includes input from staff, board members, residents, and other key stakeholders. A consensus process is used to drive the process where individuals, groups and forums are utilized to gather collective input into the agency's strategic plan.

To accomplish this Aprio:

1. facilitate discussions (zoom conference calls) and forums with certain officers, employees, and board members to set the direction of the planning process.
2. read various reports including pervious strategic plans, 5-Year PHA Plan, Annual agency Plans, Board of Commissioners minutes, development plans, agency goals, objectives and task related to operational and financial performance and supporting documents i.e. capital funds reports, certifications, and other documents provided to us.

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FIRM'S APPROACH

3. facilitate site visits to develop the strategic plan and meet with key staff, board members, resident (RAB) members, housing advocates, and other key stakeholders as determined by the Housing Authority.
4. develop a draft strategic plan and review with key members of the staff.
5. finalize and present the plan to the board of commissioners.



WHAT IS STRATEGIC PLANNING?

Strategic planning is the process used to set defined priorities and focus resources to reach organizational objectives.



ELEMENTS OF THE STRATEGIC PLAN

- Vision
- Mission
- Goals
- Measures
- Targets
- Actions
- Resources (budget)



AN APPROACH TO PLANNING

Version of Strategic Planning:

- What is the **goal**
- What **actions** do we take
- How will we do it (**tactics**)
- What will we accomplish (**strategy**)
- What is our why (**mission**)
- What is the ultimate version of us (**vision**)
- Who are we and how do we act (**values**)

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SECTION FOUR
Mission / Vision

MISSION

A missions can...

- Help to clarify the purpose and measurable goals/objectives of an organization.
- Mission statements describe the mission now and in the near future.
- Define the need or purpose of the agency.
- Provide broad general statements.
- Brief and to the point.
- Easy to understand.

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MISSION

LinkedIn:
To connect the world's professionals to make them more productive and successful.

Southwest Airlines:
Dedication to the highest quality of customer service delivered with a sense of warmth, friendliness, individual pride, and company spirit.

Microsoft:
To help people around the world realize their full potential.

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VISION

A vision can...

A vision defines what we want to be.

A vision statement of where you want to be in 5-10 years.

A vision statement is a view into the future with hope and a positive outlook.

It describes a company's inspirational, long-term plan.

Should inspire others.

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VISION

LinkedIn:
To create economic opportunity for every member of the global workforce.

Southwest Airlines:
To become the world's most loved, most flown, and most profitable airline.

Amazon:
To be earth's most customer-centric company; to build a place where people can come to find and discover anything they might want to buy online.

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SWOT

What is SWOT...

SWOT – Strengths, Weaknesses, Opportunities, and Threats
a study undertaken by an organization to identify its internal strengths and weaknesses, as well as its external opportunities and threats.

SWOT analysis aims to identify the key internal and external factors seen as important to achieving an objective. SWOT analysis groups key pieces of information into two main categories:

Internal factors — the strengths and weaknesses internal to the organization

External factors — the opportunities and threats presented by the environment external to the organization

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SWOT

SWOT ANALYSIS

	Helpful to achieving the objective	Harmful to achieving the objective
Internal origin (attributes of the organization)	S Strengths	W Weaknesses
External origin (attributes of the environment)	O Opportunities	T Threats

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TOWS

What is TOWS...

TOWS – Threats, Opportunities, Weaknesses, and Strengths a study undertaken by an organization that is similar to a SWOT that looking to match internal factors to external factors. Threats, opportunities, weaknesses and strengths.

TOWS is an acronym for threats, opportunities, weaknesses and strengths. It extends a SWOT analysis.

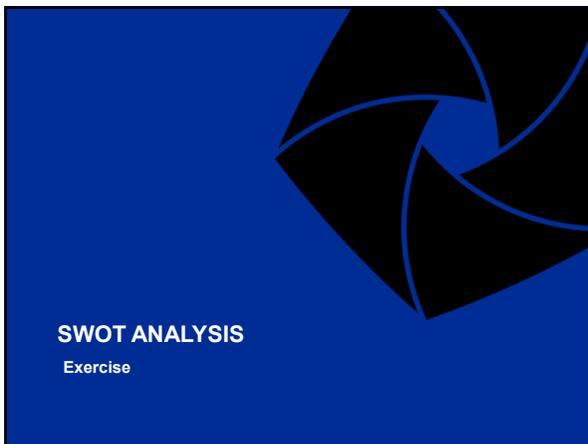
TOWS examines a company's external opportunities and threats and compares them to the firm's strengths and weaknesses. This analysis forms the basis to develop TOWS strategies and to form actionable tactics.

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TOWS

	External Opportunities (O) 1. 2. 3.	External Threats (T) 1. 2. 3.
Internal Strengths (S) 1. 2. 3.	SO <i>'Maxi-Maxi' Strategy</i> Strategies that use strengths to maximise opportunities.	ST <i>'Maxi-Min' Strategy</i> Strategies that use strengths to minimise threats.
Internal Weaknesses (W) 1. 2. 3.	WO <i>'Mini-Maxi' Strategy</i> Strategies that minimise weaknesses by taking advantage of opportunities.	WT <i>'Mini-Min' Strategy</i> Strategies that minimise weaknesses and avoid threats.

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SWOT ANALYSIS
Exercise



SECTION SIX
Goal Setting

The graphic features a solid orange background with a stylized, overlapping geometric pattern of curved lines in a darker shade of orange, resembling a camera aperture or a flower. The text 'SECTION SIX' and 'Goal Setting' is positioned in the lower-left corner.

GOAL SETTING

What are your goals...

A goal is an idea of the future or desired result that a person or a group of people envisions, plans and commits to achieve. People endeavor to reach goals within a specific deadlines.

Goals can shape the way ahead; long-term

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GOAL SETTING

Goals are part of every aspect of our lives. This extends to our personal lives to what we want to achieve at work, the way you use your spare time and so forth. It all comes down to priorities, and what we would like to accomplish. Without setting goals or objectives, life becomes a series of chaotic happenings you don't control. Accomplishments like sending someone to the moon and inventing the cellular phone are the result of a goal that was set at some point. A vision that was charted and realized.

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GOAL SETTING

Aprio works with many firms on "What's Next". This is our opportunity to look forward and review the performance, goals and objectives of firms while navigating them to achieve their goals.

The development of goals and objectives will utilize SMART Goal setting (Specific, Measurable, Attainable, Relevant and Timely). SMART goal setting brings structure and trackability with your goals and objectives. Instead of unclear resolutions, SMART goal setting creates a verifiable course towards a certain objective, with clear milestones and an estimation of the goal's attainment. Every goal or objective, from intermediary step to overarching objective, can be made SMART which yields a better opportunity of achievement.

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GOAL SETTING

Goal setting model: Verb + Noun + Outcome + date = Goal

Verb + Noun + Outcome + Date = Goal

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GOAL SETTING

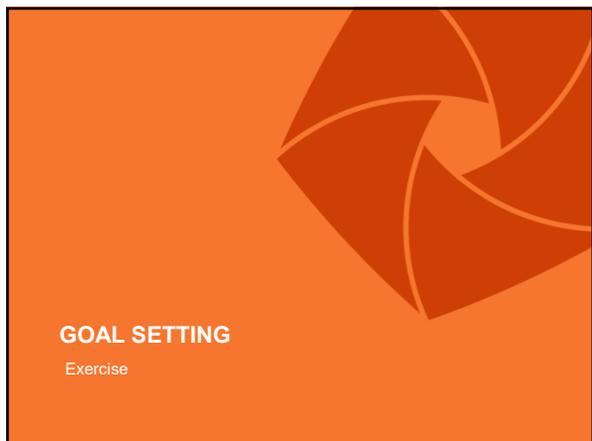
Goals...

Meet 10 of the top 30 customers by the end of February.

Increase the HCV utilization by 2% by the end of quarter 2.

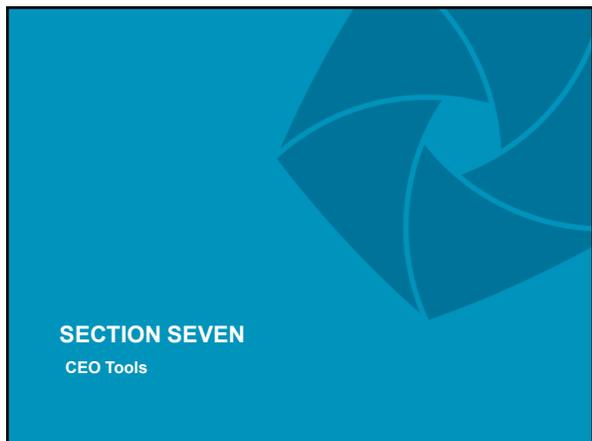
Create 3% more non-federal funding by marketing management services by September 30.

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GOAL SETTING

Exercise



SECTION SEVEN

CEO Tools

CEO TOOLS

**CEO TOOLS AND CEO TOOLS 2.0
TWO BOOKS, TWO MEN, ONE GREAT SET OF IDEAS**

THE STORY OF CEO TOOLS

- Kraig leads six turnaround companies as CEO
- Jim leads two start-up ventures
- Jim meets Kraig through CEO peer group sessions
- Kraig writes CEO Tools: The Nuts and Bolts of Business for Every Entrepreneur's Success Book
- Jim becomes chair, teacher and executive of Village
- Jim becomes CEO of Renaissance Exec Forums, CEO peer group
- Kraig passes away in 2014
- Aprio acquires all CEO Tools IP
- Jim joins Aprio as head of CEO Tools by Aprio
- CEO Tools 2.0 is published December 2017
- CEO Tools by Aprio evolves as a coaching and consulting practice based in the CEO Tools Business System and Tools



CEO Tools - Aprio[®] CEOTOOLS.COM

Aprio[®]

CEO TOOLS

CEO Tools what is the approach

A system to think, lead and manage like a CEO.

Communicate, Execute and Optimize

- ❖ Set Direction
- ❖ Communicate to Build Trust
- ❖ Track Metrics & Feedback
- ❖ Anticipate the Future and Create it
- ❖ Attract & Coach Winners
- ❖ Autonomous Company
- ❖ Celebrate Success

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CEO TOOLS

The CEO Tools Seven-Step Business System

CEO Tools © Aprio®

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CEO TOOLS

CLARITY OF DIRECTION										
GOALS:	1	2	3	4	5	6	7	8	9	10
ACTIONS:	1	2	3	4	5	6	7	8	9	10
TACTICS:	1	2	3	4	5	6	7	8	9	10
STRATEGY:	1	2	3	4	5	6	7	8	9	10
MISSION:	1	2	3	4	5	6	7	8	9	10
VISION:	1	2	3	4	5	6	7	8	9	10
VALUES:	1	2	3	4	5	6	7	8	9	10

CEO Tools © Aprio®

CEOTOOLS.COM

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CEO TOOLS - ONE PAGE BUSINESS PLAN		CEO TOOLS - Chart		COMPANY NAME	
Period	Target	Actual	Variance	Target	Actual
Q1 2019					
Q2 2019					
Q3 2019					
Q4 2019					
Q1 2020					
Q2 2020					
Q3 2020					
Q4 2020					
Q1 2021					
Q2 2021					
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Q3 2086					





5-YEAR PHA PLAN

The PHA Plan is a comprehensive guide to public housing agency (PHA) policies, programs, operations, and strategies for meeting local housing needs and goals. There are two parts to the PHA Plan: the 5-Year Plan, which each PHA submits to HUD once every 5th PHA fiscal year, and the Annual Plan, which is submitted to HUD every year by non-qualified agencies.

The PHA Plan process was established by section 5A of the United States Housing Act of 1937 (42 U.S.C. 1437 et seq.). Section 5A(b) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c-1(b)) was amended by the 2008 Housing and Economic Recovery Act (HERA), Sections 2701 and 2702, Small Public Housing Authorities Paperwork Reduction Act. This amendment provided an exemption of certain qualified PHAs from the annual plan requirement.

Reference: www.hud.gov/program_offices/public_indian_housing/pha

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5-YEAR PHA PLAN

The 5-Year Agency Plan is in accordance with the Quality Housing and Work Responsibility Act of 1998 including, but not limited to, additional updates received from the U.S. Department of Housing and Urban Development.

A qualified PHA is a PHA that:

1. Has a combined unit total of 550 or less public housing units and section 8 vouchers; and
2. Is not designated troubled under section 6(j)(2) of the 1937 Act, the Public Housing Assessment System (PHAS), as a troubled public housing agency during the prior 12 months; and
3. Does not have a failing score under the Section 8 Management Assessment Program (SEMAP) during the prior 12 months.

Reference: www.hud.gov/program_offices/public_indian_housing/pha



5-YEAR PHA PLAN

Components of the PHA Plan

A Five Year PHA Plan describes the mission of the agency and its goals and objectives.

- Public notice
- Public meeting(s)
- There is a 45-day comment period
- Public comment



5-YEAR PHA PLAN COMPONENTS

A. PHA Information.

B. 5-Year Plan.

B.1 - Mission. State the PHA's mission for serving the needs of low- income, very low- income, and extremely low- income families in the PHA's jurisdiction for the next five years.

B.2 - Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low-income, very low- income, and extremely low- income families for the next five years.

B.3 - Progress Report. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5- Year Plan.



5-YEAR PHA PLAN COMPONENTS

B.4 - Violence Against Women Act (VAWA) Goals. Provide a statement of the PHA's goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking.

B.5 - Significant Amendment or Modification. Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan.

B.6 - Resident Advisory Board (RAB) comments. (a) Did the public or RAB provide comments? (b) If yes, submit comments as an attachment to the Plan and describe the analysis of the comments and the PHA's decision made on these recommendations.

B.7 - Certification by State or Local Officials. Form HUD 50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan.

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5-YEAR PHA PLAN CERTIFICATIONS AND FORMS

PHA Certifications of Compliance with PHA Plans and Related Regulations
These certifications are the standard certification PHAs submit indicating their compliance with PHA Plan, Civil Rights Certification, and related regulations.

Civil Rights Certifications Annually, qualified public housing agencies are required to make a Civil Rights certification of the public housing program in accordance with 5A of the Act, as amended by HERA, on form HUD-50077-CR, Civil Rights Certification.

Certification by State or Local Office of PHA Consistency with the Consolidated Plan Certification by State or Local Office of PHA Plans Consistency with the Consolidated Plan. The State or Local certification of consistency must be made by the appropriate state or local officials that the PHA Plan is consistent with the Consolidate Plan(s). If the PHA is located in more than one jurisdiction, it must include a certification from each appropriate official.

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SECTION NINE
Final Thoughts

FINAL THOUGHTS

Strategic Planning:

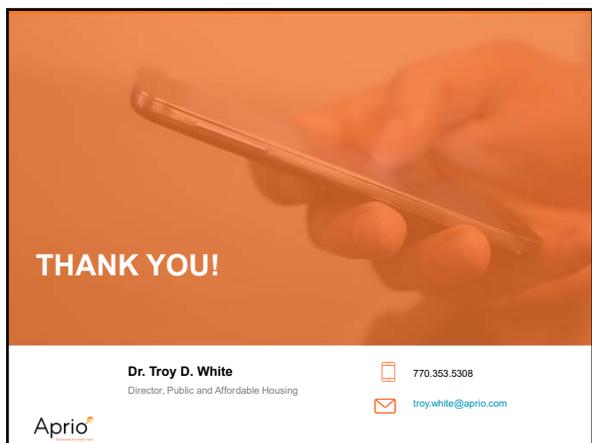
Vision – Mission – Goals – Measures – Targets – Actions - Resources (budget)

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QUESTIONS



THANK YOU!

Dr. Troy D. White
Director, Public and Affordable Housing

770.353.5308
troy.white@aprio.com

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