AGENDA

A Regular Board Meeting for:
SAN ANTONIO HOUSING TRUST FOUNDATION
will be held at the
Municipal Plaza B Room
114 W Commerce St., San Antonio, TX 78205
and virtually via ZOOM:
https://us02web.zoom.us/j/88070033634?pwd=SnRLdUR6MVhpNFp1TzlUUnhaZzhvQT09
DIAL-IN NUMBER: 1-346-248-7799 Meeting ID: 880 7003 3634 PASSWORD: 396957
On Friday, May 17, 2024, beginning at 2:00 p.m.

NOTICE: *A quorum of the board of directors will be physically located at 114 W Commerce St., San Antonio, TX 78205 at 2:00 p.m. One or more of the Directors may attend this meeting by video conference pursuant to the requirements set forth in the Texas Open Meetings Act. An electronic copy of the agenda packet may be accessed at the San Antonio Housing Trust website under the CALENDAR/Board Meeting date page prior to the meeting.*

NOTICE: *This meeting of the Board, being held for the reasons listed below, is authorized in accordance with the Texas Government Code, Sections 551.001 - 551.146. Verification of Notice of Meeting and Agenda are on file in the Office of the Executive Director.*

1. Call to Order and Roll Call
2. Discussion and possible action to approve minutes of March 22, 2024
3. Public Comment – Interested speakers will have 3 minutes each to address the Board on agenda items or housing policy related matters.
4. Briefing, discussion and possible action to approve a resolution approving a **budget amendment** for the San Antonio Housing Trust Foundation for Fiscal Year 2024 to address operating expenses amendments and adjustments.
5. Briefing, discussion and possible action to approve a Resolution to authorize the Executive Director to negotiate and execute a professional services agreement with **Ascend NBS** for grant writing services.
6. Adjournment.

Executive Session. The San Antonio Housing Trust reserves the right to adjourn into Executive Session at any time during the course of this meeting to discuss any of the matters listed on the posted agenda, above, as authorized by the Texas Government Code, Sections 551.071 (consultation with attorney), 551.072 (deliberations about real property), 551.073 (deliberations about gifts and donations), 551.074 (personnel matters), 551.076 (deliberations about security devices), and 551.087 (economic development). *ANY ITEM DISCUSSED IN EXECUTIVE SESSION MAY BE ACTED ON IN OPEN SESSION*

Attendance by Other Elected or Appointed Officials: It is possible that members of City boards, commissions and/or committees may attend the open meeting in numbers that may constitute a quorum. Notice is hereby given that the meeting, to the extent required by law, is also noticed as a meeting of any other boards, commissions and/or committees of the City, whose members may be in attendance in numbers constituting a quorum. These members of other City boards, commissions, and/or committees may not deliberate or take action on items listed on the agenda. [Attorney General Opinion – No. GA-0957 (2012)].

This facility is wheelchair accessible and accessible parking spaces are available. Requests for accommodation or interpretative services must be made 48 hours prior to this meeting. Please contact Nicole Collazo, for concerns or requests, at (210) 735-2772.

Posted on: May 10, 2024 6:49 PM

San Antonio Housing Trust Foundation
Agenda Item 2

This item includes the approval of minutes from the **March 22**, **2024** meeting.

SAN ANTONIO HOUSING TRUST FOUNDATION
2024 OFFICIAL MEETING MINUTES

DATE: March 22, 2024

TIME AND PLACE: The San Antonio Housing Trust Foundation met in session at 2:14 p.m., via Zoom and in person at 114 W Commerce, San Antonio, TX 78205.

PRESENT: Antoinette Brumfield, Mark Carmona, Councilmember Teri Castillo, Jordan Ghawi, Rachell Hathaway, Councilmember Sukh Kaur, Councilmember Jalen McKee-Rodriguez, Marinella Murillo Eric Cooper, Councilmember Adriana Rocha Garcia, and Councilmember Phyllis Viagran. and Jane Paccione.

ABSENT:

STAFF/VISITORS PRESENT:
Pedro Alanis- Executive Director San Antonio Housing Trust; Nicole Collazo- Director of Operations San Antonio Housing Trust; Susan Snowden- Financial Director San Antonio Housing Trust; Tom Roth- Director of Development San Antonio Housing Trust; Seema Kairam- Real Estate Development Manager of San Antonio Housing Trust; Jessica Kuehne- Director of Asset Management San Antonio Housing Trust; Lauren Bejaran- Senior Administrative Assistant San Antonio Housing Trust; Justin Renteria- District 5; Sabine Miramontes-Somers- SEFLA Languages Interpreter; Norma Little- Leal & Carter, PC; Emily Sanchez- Leal& Carter, PC; Patrick Steck- Assistant Human Services Director- City of San Antonio; Clarissa Rodriguez- Denton Navarro Rocha Bernal & Zech, P.C.; Summer Greathouse-Bracewell.

1. **CALL TO ORDER AND ROLL CALL:** The meeting was called to order by President Rocha Garcia and the roll was called by Lauren Bejaran.

2. **DISCUSSION AND POSSIBLE ACTION TO APPROVE MINUTES OF FEBRUARY 16, 2024.**
MINUTES COMMISSION ACTION:
Jordan Ghawi motioned, and Councilmember Teri Castillo seconded to approve the February 16, 2024, minutes.
AYES: 11
NAYS:
ABSTAINED:
THE MOTION PASSED.

3. **PUBLIC COMMENT – INTERESTED SPEAKERS WILL HAVE 3 MINUTES EACH TO ADDRESS THE BOARD ON AGENDA ITEMS OR HOUSING POLICY RELATED MATTERS.**

NONE.
NO ACTION TAKEN.

4. **PRESENTATION AND POSSIBLE ACTION REGARDING THE SAN ANTONIO HOUSING TRUST FOUNDATION, INC. AUDITED FINANCIAL REPORT FOR FISCAL YEAR ENDING SEPTEMBER 30, 2022.**
Norma from Leal & Carter, PC briefed the board on the FY 2022 Audit draft for the San Antonio Housing Trust Foundation.

MINUTES COMMISSION ACTION:
Councilmember Jalen McKee-Rodriguez motioned, and Jordan Ghawi seconded to approve the FY 2022 Audit for the San Antonio Housing Trust Foundation.
AYES: 11
NAYS:
ABSTAINED:
THE MOTION PASSED.

5. **CONSIDERATION AND ACTION TO APPROVE RESOLUTION NO. F24-0322-05 APPROVING AN APPLICATION BY THE FOUNDATION FOR AN URBAN LAND INSTITUTE GRANT AND AUTHORIZING SPONSORSHIP OF THE 2024 AT-RISK YOUTH HOUSING SUMMIT AND ADDRESSING RELATED MATTERS.**
   Executive Director, Pete Alanis, briefed the board on the proposed resolution approving an application by the Foundation for an Urban Land Institute Grant.

   MINUTES COMMISSION ACTION:
   Jane Paccione motioned, and Councilmember Dr. Sukh Kaur seconded to approve Item #5.
   AYES: 11
   NAYS:
   ABSTAINED:
   THE MOTION PASSED.

6. **CONSIDERATION AND ACTION ON RESOLUTION NO. F24-0322-06 APPROVING THE RELEASE OF A REQUEST FOR PROPOSALS FOR AN ON-CALL, EXPERIENCED GRANT WRITER TO PURSUE AND OBTAIN PUBLIC AND PRIVATE GRANT AND OTHER FINANCIAL OPPORTUNITIES FOR THE FOUNDATION.**
   Executive Director, Pete Alanis, briefed the board on the proposed resolution approving the release of a request for proposals for an On-Call, Grant Writer for the San Antonio Housing Trust Foundation.

   MINUTES COMMISSION ACTION:
   Jane Paccione motioned, and Marinella Murillo seconded to approve Item #6.
   AYES: 11
   NAYS:
   ABSTAINED:
   THE MOTION PASSED.

7. **ADJOURNMENT**
   President Rocha Garcia adjourned the meeting. There being no further business, the meeting was adjourned at 2:36 p.m.

San Antonio Housing Trust Foundation
Agenda Item 3

Public Comment

Interested speakers will have 3 minutes each to address the Board on agenda items or housing policy related matters; a total of 15 minutes will be provided. Instructions to sign up for Public Comment via Zoom video conference.

To sign up for Public Comment please call 210-735-2772 24 hours prior to this meeting to place your name on the list.

Los oradores interesados tendrán 3 minutos cada uno para dirigirse a la Junta sobre temas de la agenda o asuntos relacionados con la polí ca de vivienda; Se proporcionará un total de 15 minutos.

Para inscribirse en Comentario Público, llame al 210-735-2772 24 horas antes de esta reunión para incluir su nombre en la lista.

San Antonio Housing Trust Foundation
Agenda Item 4

Briefing, discussion, and possible action to approve FY 2024 Mid-Year Budget Amendment for the San Antonio Housing Trust Foundation.

Summary

Each budget year, the Executive Team reviews the mid-year revenue and expenditure estimates while conducting a forecast of end of fiscal year's revenues, operational needs, and programmatic goals ensuring we stay in line with board adopted annual priorities.

As of March 31, 2024

The SA Housing Trust Foundation has *earned* $560k in total revenues, approximately 50% of the annual projected revenue of $1.12 million. The SA Housing Trust Foundation has *spent* $815k in operating expenses or 43% of the $1.86 million adopted annual budget.

Foundation Revenues

The San Antonio Housing Trust Foundation receives operating revenues primarily from contributions from the PFC, Finance Corporations, and interest income on existing cash investments. Staff has reviewed the performance of our income sources. In the first half of FY 2024, we were about 7% below expected operating revenues due to reduced revenues from the PFC and Finance Corporations. We have made up that difference in better-than-expected interest earnings. However, due to the PFC earnings forecast, we recommend amending the operating revenues to reflect a $235k budget reduction.

Foundation Expenses

The San Antonio Housing Trust Foundation spends operating funds on *administrative services* supporting the four SAHT entities and *program expenses* supporting Foundation specific grant awards and sponsorships. The following table shows a **summary** of budget to actuals and new proposed budget by category:

Admin/Prof Categories	FY 2024 Budget	6-mos Actual	% spent	Amended Budget
Payroll Expenses	$1,055,702	$486,850	46.1%	1,094,549
Professional Services	197,500	65,915	33.3%	258,500
Rent Expense	121,615	22,838	18.8%	78,145
Maintenance & Repairs	111,050	12,951	11.6%	137,401
Office Expenses/Subscriptions	72,750	69,756	95.8%	88,250
Travel/Training	45,000	7,539	16.8%	25,000
Insurance/Utilities	20,900	5,821	27.8%	20,900
Telephone and Internet	6,000	2,930		6,000
Meals & Events	5,500	2,256	41.0%	5,500
Advertising	5,000	141	2.4%	5,000
Bank Fees & Service Charges	500	231	46.3%	500
Total	**$1,641,517**	**$677,128**	**41.2%**	**1,719,745**

While operating expenses related to administrative costs were in line with budget expectations, staff is proposing a $78,228 increase in administrative expenses to hire an additional employee (ahead of FY

2025), increase 3rd party audit services, increase funds for grant writing services and hire consultant to prepare educational tools related to vouchers. Finally, we are also reflecting repair commitments made to McIlvaine House, which were already approved by the Board.

Program Expense Categories	FY 2024 Budget	6-mos Actual	% spent	Amended Budget
Grants to Others	$0	$137,908		$599,500
Program Expenses	220,000	0		20,000
Total	**$220,000**	**$137,908**	62.6%	**$619,500**

On the programmatic side, the acting CFO seeks to show the prior year grant awards that are expending funds during this Fiscal Year as part of the FY 2024 Budget. This includes moving $200,000 in MAUC CLT from program expense line time to "Grant to Others" as well as recognizing prior year awards such as Town Twin Village, Esperanza CLT, Emanual Village, and City sponsored events that flow through the foundation.

Recommendation:
Staff recommends approving a resolution authorizing a budget amendment to reflect the proposed changes.

Attachment:
Resolution
Proposed Amended Budget

FOUNDATION
Budget to Actual Analysis

% of Year - 50%

	October 1, 2023 - March 31, 2024		
	Annual Budget	Actual	% of Budget
OPERATING REVENUES			
Grant Income			
CoSA - NHSD Sponsored Events	$ -	$ 20,000.00	
Total Grant Income	-	20,000.00	#DIV/0!
Fee Income			
SAHT Finance Corporation	$ 33,760.00	13,066.72	
SAHT Public Facility Corporation	984,361.00	428,753.04	
Total Fee Income	1,018,121.00	441,819.76	43.40%
Interest Income - Loans	30,000.00	25,769.30	85.90%
TOTAL OPERATING REVENUES	**1,048,121.00**	**487,589.06**	
OPERATING EXPENSES			
Advertising and Marketing	5,000.00	141.25	2.83%
Bank Fees & Service Charges	500.00	231.49	46.30%
Grants to Others			
CoSA - NHSD Sponsored Events	-	5,908.69	
Housing First Community Coalition	-	132,000.00	
Total Grants to Others	-	137,908.69	#DIV/0!
Insurance Expense		349,680.37	
Insurance - Business Owner's	5,200.00	2,398.50	
Insurance - Crime	1,500.00	673.01	
Insurance - Directors & Officers	10,000.00	-	
Insurance - Workers Comp	1,200.00	265.02	
Total Insurance Expense	17,900.00	3,336.53	18.64%
Maintenance & Repairs			
General Maintenance & Repairs	100,000.00	2,740.00	
Grounds Maintenance & Mowing	2,250.00	630.00	
Moving Expenses	7,500.00	-	
Office Cleaning	900.00	700.00	
Pest Control	400.00	-	
Tenant Operating Costs	-	8,880.99	
Total Maintenance & Repairs	111,050.00	12,950.99	11.66%
Meals & Events	5,500.00	2,256.79	41.03%
Office Expenses			
Equipment Purchases	5,000.00	20,812.19	
Furniture Purchases	40,000.00	32,884.40	
Mileage, Parking & Tolls	500.00	105.50	

SAN ANTONIO HOUSING TRUST

FOUNDATION
Budget to Actual Analysis

% of Year - 50%

	October 1, 2023 - March 31, 2024		
	Annual Budget	**Actual**	**% of Budget**
OPERATING EXPENSES (Continued)			
Office Expenses (Continued)			
Office Supplies	5,000.00	4,555.00	
Printing & Photocopying	1,000.00	-	
Security & Monitoring	400.00	383.46	
Shipping & Postage	750.00	564.40	
Shredding Services	100.00	-	
Total Office Expenses	52,750.00	59,304.95	112.43%
Payroll Expenses			
Allowance - Auto	24,000.00	13,567.34	
Allowance - Telephone	2,400.00	1,218.39	
Insurance - Dental	5,000.00	2,486.16	
Insurance - Health	84,000.00	35,808.08	
Insurance - Life	15,000.00	2,450.40	
Payroll Tax Expense	62,125.00	31,210.25	
Retirement Plan Expense	96,463.00	46,035.90	
Salaries & Wages	766,714.00	354,074.09	
Total Payroll Expense	1,055,702.00	486,850.61	46.12%
Professional Services			
Accounting & CFO Services	57,600.00	26,164.75	
Audit Services	29,400.00	6,000.00	
Legal Services	50,000.00	16,625.83	
Marketing & Public Relations Services	30,000.00	11,450.00	
Strategic Planning Services	7,500.00	3,125.00	
Web Hosting	3,000.00	1,250.00	
Other Professional Services	20,000.00	1,299.80	
Total Professional Services	197,500.00	65,915.38	33.37%
Program Expenses			
Community Land Trusts	200,000.00	-	
Sponsorships	20,000.00	-	
Total Program Expenses	220,000.00	-	0.00%
Rent Expense			
Equipment Rent	6,000.00	1,963.90	
Facilities Rent	115,615.00	20,874.00	
Total Rent Expense	121,615.00	22,837.90	18.78%
Subscriptions			
Subscriptions - Memberships & Fees	5,000.00	1,808.13	
Subscriptions - Software Licenses	15,000.00	8,643.59	
Total Subscriptions	20,000.00	10,451.72	52.26%
Telephone & Internet	6,000.00	2,930.04	48.83%
Travel & Training	45,000.00	7,539.25	16.75%

SAN ANTONIO HOUSING TRUST

FOUNDATION
Budget to Actual Analysis

% of Year - 50%

	October 1, 2023 - March 31, 2024		
	Annual Budget	**Actual**	**% of Budget**
OPERATING EXPENSES (Continued)			
Utilities	3,000.00	2,484.67	82.82%
TOTAL OPERATING EXPENSES	**1,861,517.00**	**815,140.26**	43.79%
OPERATING INCOME (LOSS)	**(813,396.00)**	**(327,551.20)**	
NONOPERATING REVENUES (EXPENSES)			
Intergovernmental Revenues			
Asset Management Services	$ 243,444.00	$ 42,247.64	
Compliance Monitoring Services	91,400.00	39,910.00	
TOTAL INTERGOVERNMENTAL REVENUES	334,844.00	82,157.64	24.54%
NONOPERATING REVENUES (EXPENSES) (Continued)			
Intergovernmental Expenses			
Asset Management Services	(243,444.00)	(42,247.64)	
Compliance Monitoring Services	(91,400.00)	(39,910.00)	
TOTAL INTERGOVERNMENTAL EXPENSES	(334,844.00)	(82,157.64)	24.54%
Interest Income			
Interest - Investing	-	12,823.20	
Interest - Operating	75,000.00	60,303.88	
Total Interest Income	75,000.00	73,127.08	97.50%
Depreciation Expense	-	-	
Gain on Sale	-	-	
Interest Expense	-	-	
Loans Forgiven - Residential	-	-	
Funding - Operating Reserves	-	-	
TOTAL NONOPERATING REVENUES (EXPENSES)	**75,000.00**	**73,127.08**	97.50%
INCREASE (DECREASE) IN NET POSITION	**$ (738,396.00)**	**$ (254,424.12)**	34.46%

SAN ANTONIO HOUSING TRUST

SAN ANTONIO HOUSING TRUST FOUNDATION
FY 2024 Proposed Budget Amendment

	FY 2024 Adopted Budget	Proposed Amendment	FY 2024 Amended Budget
OPERATING REVENUES			
Grant Income			
CoSA - NHSD Sponsored Events	$ -	$ 22,500.00	$ 22,500.00
Total Grant Income	-	22,500.00	22,500.00
Fee Income			
SAHT Finance Corporation	$ 33,760.00	$ -	33,760.00
SAHT Public Facility Corporation	984,361.00	(257,715.10)	726,645.90
Total Fee Income	1,018,121.00	(257,715.10)	760,405.90
Interest Income - Loans	30,000.00	-	30,000.00
TOTAL OPERATING REVENUES	**1,048,121.00**	**(235,215.10)**	**812,905.90**
OPERATING EXPENSES			
Advertising and Marketing	5,000.00	-	5,000.00
Bank Fees & Service Charges	500.00	-	500.00
Grants to Others			
CoSA - NHSD Sponsored Events	-	22,500.00	22,500.00
Esperanza Grant	-	200,000.00	200,000.00
Faith-Based Initiative Grant	-	45,000.00	45,000.00
Housing First Community Coalition	-	132,000.00	132,000.00
Mexican American Unity Council	-	200,000.00	200,000.00
Total Grants to Others	-	599,500.00	599,500.00
Insurance Expense			
Insurance - Business Owner's	5,200.00	-	5,200.00
Insurance - Crime	1,500.00	-	1,500.00
Insurance - Directors & Officers	10,000.00	-	10,000.00
Insurance - Workers Comp	1,200.00	-	1,200.00
Total Insurance Expense	17,900.00	-	17,900.00
Maintenance & Repairs			
General Maintenance & Repairs	100,000.00	-	100,000.00
Grounds Maintenance & Mowing	2,250.00	(1,620.00)	630.00
Moving Expenses	7,500.00	(2,029.00)	5,471.00
Office Cleaning	900.00	-	900.00
Pest Control	400.00	-	400.00
Tenant Operating Costs (CAM)	-	30,000.00	30,000.00
Total Maintenance & Repairs	111,050.00	26,351.00	137,401.00
Meals & Events	5,500.00	-	5,500.00
Office Expenses			
Equipment Purchases	5,000.00	13,000.00	18,000.00
Furniture Purchases	40,000.00	1,000.00	41,000.00
Mileage, Parking & Tolls	500.00	-	500.00
Office Supplies	5,000.00	1,500.00	6,500.00
Printing & Photocopying	1,000.00	-	1,000.00
Security & Monitoring	400.00	-	400.00
Shipping & Postage	750.00	-	750.00
Shredding Services	100.00	-	100.00
Total Office Expenses	52,750.00	15,500.00	68,250.00

SAN ANTONIO HOUSING TRUST

SAN ANTONIO HOUSING TRUST FOUNDATION
FY 2024 Proposed Budget Amendment

	FY 2024 Adopted Budget	Proposed Amendment	FY 2024 Amended Budget
Payroll Expenses			
Allowance - Auto	24,000.00	-	24,000.00
Allowance - Telephone	2,400.00	-	2,400.00
Insurance - Dental	5,000.00	-	5,000.00
Insurance - Health	84,000.00	10,000.00	94,000.00
Insurance - Life	15,000.00	(10,000.00)	5,000.00
Payroll Tax Expense	62,125.00	4,666.97	66,791.97
Retirement Plan Expense	96,463.00	(1,967.56)	94,495.44
Salaries & Wages	766,714.00	36,148.32	802,862.32
Total Payroll Expense	1,055,702.00	38,847.73	1,094,549.73
Professional Services			
Accounting & CFO Services	57,600.00	-	57,600.00
Audit Services	29,400.00	15,000.00	44,400.00
Legal Services	50,000.00	-	50,000.00
Marketing & Public Relations Services	30,000.00	-	30,000.00
Strategic Planning Services	7,500.00	-	7,500.00
Web Hosting	3,000.00	-	3,000.00
Other Professional Services	20,000.00	46,000.00	66,000.00
Total Professional Services	197,500.00	61,000.00	258,500.00
Program Expenses			
Community Land Trusts	200,000.00	(200,000.00)	-
Sponsorships	20,000.00	-	20,000.00
Total Program Expenses	220,000.00	(200,000.00)	20,000.00
Rent Expense			
Equipment Rent	6,000.00	-	6,000.00
Facilities Rent	115,615.00	(43,469.37)	72,145.63
Total Rent Expense	121,615.00	(43,469.37)	78,145.63
Subscriptions			
Subscriptions - Memberships & Fees	5,000.00	(3,000.00)	2,000.00
Subscriptions - Software Licenses	15,000.00	3,000.00	18,000.00
Total Subscriptions	20,000.00	-	20,000.00
Telephone & Internet	6,000.00	-	6,000.00
Travel & Training	45,000.00	(20,000.00)	25,000.00
Utilities	3,000.00	-	3,000.00
TOTAL OPERATING EXPENSES	**1,861,517.00**	**477,729.36**	**2,339,246.36**
OPERATING INCOME (LOSS)	**(813,396.00)**	**(712,944.46)**	**(1,526,340.46)**
NONOPERATING REVENUES (EXPENSES)			
Intergovernmental Revenues			
Asset Management Services	$ 243,444.00	$ (119,495.87)	123,948.13
Compliance Monitoring Services	91,400.00	82,150.00	173,550.00
TOTAL INTERGOVERNMENTAL REVENUES	334,844.00	(31,345.87)	303,498.13

SAN ANTONIO HOUSING TRUST

SAN ANTONIO HOUSING TRUST FOUNDATION
FY 2024 Proposed Budget Amendment

	FY 2024 Adopted Budget	Proposed Amendment	FY 2024 Amended Budget
NONOPERATING REVENUES (EXPENSES) (Continued)			
Intergovernmental Expenses			
Asset Management Services	(243,444.00)	119,495.87	(123,948.13)
Compliance Monitoring Services	(91,400.00)	(82,150.00)	(173,550.00)
Security Services	-	-	
TOTAL INTERGOVERNMENTAL EXPENSES	(334,844.00)	31,345.87	(303,498.13)
Funding - Operating Reserves	-	1,451,340.46	1,451,340.46
TOTAL NONOPERATING REVENUES (EXPENSES)	**75,000.00**	**1,451,340.46**	**1,526,340.46**
INCREASE (DECREASE) IN NET POSITION	**$ (738,396.00)**	**$ 738,396.00**	**$ -**

SAN ANTONIO HOUSING TRUST FOUNDATION, INC.

RESOLUTION F24-0517-04

A RESOLUTION APPROVING A BUDGET AMENDMENT FOR THE SAN ANTONIO HOUSING TRUST FOUNDATION, INC. FOR FISCAL YEAR 2024 TO REFLECT A BUDGET REDUCTION BASED ON EXPECTED OPERATING REVENUES; AND ADDRESSING RELATED MATTERS.

WHEREAS, each year, the San Antonio Housing Trust Foundation (sometimes "Foundation") reviews the mid-year revenue and expenditure estimates while conducting a forecast of revenues, operational needs, and programmatic goals for the end of the fiscal year;

WHEREAS, as of March 31, 2024, due to the performance of Foundation income sources, the Foundation has projected a reduction of about 7% below expected operating revenues; and

WHEREAS, as of even date, the Foundation budget also reflected the realization of prior year awards, which have also impacted budget expectations thus far; and

WHEREAS, after reviewing the needs of the Foundation operations, the Executive Director recommends an amendment reflecting a reduction to the Foundation budget; and

WHEREAS, the Housing Trust Foundation Board of Directors finds this budget adjustment in the public interest based on the realignment of the Foundation for addressing operating expenses and for meeting its strategic goals and for such stated purpose as warranted and necessary.

NOW THEREFORE, BE IT RESOLVED BY THE SAN ANTONIO HOUSING TRUST FOUNDATION, INC. THAT:

Section 1. The above Recitals are true and correct and are a material part of this Resolution and are incorporated herein for all purposes.

Section 2. The Board of Directors for the San Antonio Housing Trust Foundation, Inc. does hereby approve the budget amendment as recommended by the Executive Director for the Fiscal Year beginning October 1, 2023, and ending September 30, 2024, to reflect a $235,000.00 budget reduction in operating revenues and a $477,729.39 budget increase in operating expenses, and proposed funding of approximately $1.45 million through operating reserves as further indicated in Exhibit A to this Resolution.

Section 3. If any section, subsection, clause, phrase or provision of this Article, or any application thereof to any person or circumstance, shall to any extent be held by a court of competent jurisdiction to be invalid, void, or unconstitutional, the remaining sections, subsections, clauses, phrases and provisions of this Article, or any application thereof to any person or circumstance, shall remain in full force and effect and shall in no way be affected, impaired, or invalidated.

Section 4. This Resolution shall be cumulative of all provisions of the Housing Trust Foundation, except where the provisions of this Resolution are in direct conflict with the provisions of such

Resolution, in which event the conflicting provisions of such Resolution are hereby repealed.

Section 5. That it is officially found, determined and declared that the meeting at which this Resolution is adopted was open to the public and public notice of the time, place, and subject matter of the public business to be considered at such meeting, including this Resolution, was given, all as required by Chapter 551, as amended, Texas Government Code.

Section 6. This Resolution shall take effect immediately from and after its passage and the publication of the caption hereof, as provided by law.

PASSED and APPROVED this the ___day of May 2024.

SIGNED:

_____
Councilwoman Adriana Rocha Garcia
President

ATTEST:

_____
Jordan Ghawi, Secretary

San Antonio Housing Trust Foundation
Agenda Item 5

Briefing, discussion and possible action to approve a Resolution to authorize the Executive Director to negotiate and execute a professional services agreement with Ascend NBS for grant writing services.

Summary

The San Antonio Housing Trust continues to explore for opportunities to provide additional and continuing housing opportunities for low- and moderate-income families and revitalize our neighborhoods through appropriate housing activities. Securing funding is paramount for the San Antonio Housing Trust to continue its mission.

In March 2024, SAHT released a Request for Proposal to identify and select an experienced professional Grant Writer consultant or firm with a proven track record of researching, developing, writing, preparing, and submitting successful grant proposals to raise both public and private funds in support of creative housing solutions for those with various forms of disabilities, persons experiencing homelessness, former foster youth, transitioning veterans' older adults, and other inequitably disadvantaged populations.

The RFP requested information on the consultant or firm's comprehensive experience, approach and methodology, professional qualifications, and fee structure. The Evaluation Panel consisting of staff evaluated the proposals based on the following point scale identified in the Board Approved RFP:

- *Comprehensive Experience* (20 points)
- *Professional Qualifications* (20 points)
- *Current Work and Contract History* (35 points)
- *Fee Structure* (15 points)
- *Certified MWOBE* (10 points)

SAHT received two responsive proposals from **Ascend NBS** and **Tacit Growth Strategies**. Ascend NBS scored 94 points. Tacit Growth Strategies scored 76 points. The difference in scoring was primarily due to Ascend's streamlined approach and grant management of researching and applying for grant opportunities.

Ascend NBS

ASCEND is a local firm in San Antonio, Texas. They have successfully secured over $175 million in funding since 2019. Ascend approach and methodology provides comprehensive research and review of federal, state and private foundation grants. Services include:

- Attend required meetings, participate in pre-submittal grant webinars/workshops, and provide detailed reports summarizing efforts and the status of all grants applied for.
- Utilizing specialized databases to research comprehensive review of federal, state, and private foundation grants.
- Grant analysis and assessment of grant opportunities are evaluated based on criteria that align with SAHT's mission to enable strategic decision making and prioritize funding opportunities that best serve the needs of SAHT.
- Proposal Development and Writing Process to effectively convey SAHT's objectives and secure funding.

- Preparing applications for submission and creating graphs, charts, and visuals to illustrate programmatic concepts and secure supplemental documentation such as letters of support.
- Submit the fully complete grant applications on behalf of SAHT and follow up with fund as necessary to provide additional information.

Ascend has worked with numerous nonprofits across a diverse spectrum of services and focus areas, all dedicated to assisting populations that align closely with those SAHT serves. They have helped nonprofits, government entities, K-12 schools, higher education institutions and businesses. Their proposal showed a good mix of successfully securing public and private grant funding.

Ascend has five years of dedicated service in the industry. Ascend is a certified WOSB, NMSDC, WBE, ESBE, SBE, and HUB. Their team boasts experience in grant strategy, research, writing, reporting and management. Ascend's NBS founder and CEO Arlene Siller, PhD, has over 20 years of experience in successful grant writing and management. Her team of 15 staff members comprises experienced grant writers and researchers, coordinators, and managers.

Fiscal Impact

Ascend proposed cost structure will work with SAHT to not exceed a certain dollar amount. They will charge hourly based on team member's time and expenses for various projects. Cost will vary based on type of grant application, agency, requirements of proposal, and time spent. The proposed FY 2024 SAHT Foundation Amended Budget includes an allocation of $66,000 for Professional Services fees.

Recommendation:

Staff recommends entering into a professional services agreement with Ascend.

Attachment:

Resolution
Proposal

SAN ANTONIO HOUSING TRUST FOUNDATION, INC.

RESOLUTION F24-0517-04

A RESOLUTION OF THE SAN ANTONIO HOUSING TRUST FOUNDATION, INC. APPROVING THE HIRING OF ASCEND NONPROFIT & BUSINESS SOLUTIONS FOR THE SERVICES OF A GRANT WRITER; AUTHORIZING THE EXECUTIVE DIRECTOR TO EXECUTE ALL DOCUMENTS; AND ADDRESSING RELATED MATTERS.

WHEREAS, pursuant to Declaration of Trust, Article III, Section 3.3.1, as amended by Resolution No. 90-0801 passed on August 15, 1990, and approved by Ordinance No. 72563 passed on November 1, 1990, the San Antonio Housing Trust Foundation, Inc. (sometimes the "Foundation"), a Texas non-profit corporation, is responsible for the administrative support of the operations of the City of San Antonio Housing Trust; and

WHEREAS, under Ordinance No. 74452 passed on September 26, 1991, the San Antonio Housing Trust Foundation, Inc. was designated and approved to be the administrative and fiscal agent of the City of San Antonio Housing Trust for the disbursement of awards of Trust assistance to sponsors of affordable housing projects and programs; and

WHEREAS, in order to enhance the capacity of the Foundation to expand the provision of affordable housing, the Foundation finds that the assistance of a grant writer is warranted in order to obtain and leverage grant and other advantageous funding sources which may be available; and

WHEREAS, pursuant to Resolution F24-0322-06, passed on March 22, 2024, the Foundation Board of Directors approved the submission of requests for proposals to procure a grant writer aligned with the purposes of providing affordable housing programs to the community; and

WHEREAS, after reviewing the proposals in response to the procurement solicitation, the Foundation Board, based on its objective evaluation structure, has determined that Ascend Nonprofit & Business Solutions is the best qualified respondent.

NOW THEREFORE, BE IT RESOLVED BY THE SAN ANTONIO HOUSING TRUST FOUNDATION, INC. THAT:

Section 1. The above Recitals are true and correct and are a material part of this Resolution and are incorporated herein for all purposes.

Section 2. The Board of Directors for the San Antonio Housing Trust Foundation, Inc. does hereby select Ascend Nonprofit & Business Solutions as an experienced, professional grant writer for the solicitation of public and private funding grants and other resources in order to increase the financial capacity of the Foundation, and as further described in Exhibit A to this Resolution.

Section 3. The Board of Directors hereby authorizes the Executive Director to execute or oversee the provision and execution of any and all necessary documents and forms related to securing the services of Ascend Nonprofit & Business Solutions.

Section 4. If any section, subsection, clause, phrase or provision of this Article, or any application thereof to any person or circumstance, shall to any extent be held by a court of competent jurisdiction to be invalid, void, or unconstitutional, the remaining sections, subsections, clauses, phrases and provisions of this Article, or any application thereof to any person or circumstance, shall remain in full force and effect and shall in no way be affected, impaired, or invalidated.

Section 5. This Resolution shall be cumulative of all provisions of the Housing Trust Foundation, except where the provisions of this Resolution are in direct conflict with the provisions of such Resolution, in which event the conflicting provisions of such Resolution are hereby repealed. This Resolution hereby repeals any prior Resolutions regarding the subject herein.

Section 6. That it is officially found, determined and declared that the meeting at which this Resolution is adopted was open to the public and public notice of the time, place, and subject matter of the public business to be considered at such meeting, including this Resolution, was given, all as required by Chapter 551, as amended, Texas Government Code.

Section 7. This Resolution shall take effect immediately from and after its passage and the publication of the caption hereof, as provided by law.

PASSED and APPROVED this the ___day of May 2024.

(signature page follows)

SIGNED:

_____
Councilwoman Adriana Rocha Garcia
President

ATTEST:

_____
Jordan Ghawi, Secretary

ASCEND
NONPROFIT & BUSINESS SOLUTIONS

Cover Letter / Statement of Interest

April 29, 2024

Nicole Collazo
Director of Operations
SA Housing Trust
8200 IH 10 West Suite 501
San Antonio, TX 78230

Re: REQUEST FOR PROPOSALS - GRANT WRITER SERVICES

We are thrilled to submit our proposal for the Grant Writing Services opportunity as outlined in the Request for Proposals (RFP) issued by the San Antonio Housing Trust (SAHT). Our proposal reflects the comprehensive scope of services we offer, including grant researching, developing, writing, preparing, and submitting successful grant proposals to raise both public and private funds in support of creative housing solutions for inequitably disadvantaged populations.

Ascend Nonprofit & Business Solutions (NBS) LLC is a certified WOSB, NMSDC, WBE, MBE, ESBE, SBE, and HUB firm headquartered in San Antonio, Texas. Specializing in grant training, coaching, research, and writing, we have successfully secured over $175 million in funding for our clients since 2019. Ascend NBS meets all the required qualifications outlined in the RFP to include 3 years of relevant work experience in grant proposal writing, 3 years of successful grant writing experience including sourcing, developing, writing, and submitting successful grant proposals, and have a proven track record in securing new funding opportunities, comprehensive knowledge of research, and the ability to distinguish and identify funding opportunities for special programs. Our team comprises experienced grant writers and researchers, coordinators, and managers, all dedicated to achieving the highest standards of excellence.

In our consultant capacity, Ascend NBS is committed to facilitating the grant acquisition process for the SAHT. Our approach begins with meticulous grant research and analysis to identify suitable funding opportunities aligned with SAHT's housing objectives. Collaborating effectively with SAHT staff, we ensure seamless information flow and teamwork to maximize our collective efforts.
Ascend NBS leverages its expertise to craft compelling grant proposals that meet all funder requirements, ensuring alignment with the SAHT's mission and priorities.

Our services include attending required meetings, participating in pre-submittal grant webinars/workshops, and providing detailed reports summarizing our efforts and the status of all grants applied for. This contract will solely involve Ascend NBS; no sub-consultants will be engaged. Thank you for considering Ascend Nonprofit & Business Solutions (NBS) LLC for this important opportunity. We are eager to contribute our expertise and support the SAHT in achieving its housing objectives. Should you have any questions or require further information, please do not hesitate to contact us.

If you have any questions or require further information, please do not hesitate to contact us. Our primary contact is Daniela Paz, Chief Operations Officer (COO) and can be reached at 830-293-4007 or daniela.paz@ascendnbs.com. Our secondary contact for this RFP is Dr. Arlene Siller, Founder & CEO of Ascend NBS, who can be reached at 210-610-2440 or arlene.siller@ascendnbs.com.
Thank you for considering our proposal.

Sincerely,

Ascend Nonprofit & Business Solutions LLC
13322 Sage Heights
San Antonio, TX 78230
Signed by: Arlene Siller, PhD
Title: Founder and CEO
Signature: Arlene Siller

Approach and Methodology

Securing funding is paramount for the San Antonio Housing Trust (SAHT) to realize its mission of creating and preserving affordable, accessible, and sustainable housing for the residents of San Antonio. However, navigating the stringent eligibility criteria and extensive documentation required for government grants, and the wide range of application processes and focus areas of private funding sources, can strain nonprofit resources seeking funding. To address these challenges, the SAHT must develop a diversified funding strategy, cultivate relationships with funders, demonstrate impact and accountability, and adapt to changing funding landscapes. Ascend NBS' approach and methodology are meticulously crafted to address the challenges and opportunities associated with this endeavor. Our approach to completing the tasks outlined in the scope of work is as follows:

- **Research:** Our research strategy encompasses a comprehensive review of federal, state, and private foundation grants, utilizing specialized databases such as Candid's Foundation Directory, grants.gov, and GrantStation™, GrantWatch™, and Instrumental, to name a few. We align the SAHT's priorities with available resources and upcoming federal, state, regional, or other grant funding opportunities. Additionally, we proactively engage with potential funding partners and explore innovative funding mechanisms to maximize funding opportunities. Our team has strong research skills and can analyze grant guidelines and requirements to determine if the client is eligible to apply.
- **Grant Analysis and Assessment:** Grant opportunities identified during the research stage are rigorously evaluated based on criteria such as alignment with SAHT's mission, eligibility criteria, potential for impact, timelines, and feasibility of implementation. This analysis informs strategic decision-making and enables us to prioritize funding opportunities that best serve the needs of SAHT and the community it serves. We assist our clients in determining well-aligned grants based on their funding needs and advise them on the strength of their project when competing for the grant. Potential grant opportunities are discussed with the client and prioritized based on their potential for funding and alignment with the SAHT's priorities, budget, project readiness, and other funding available.
- **Proposal Development and Writing Process:** Our proposal development and writing process is iterative and collaborative, involving input from key stakeholders and subject matter experts. Ascend NBS will coordinate and collect data from SAHT to assist in preparation and submittal of grant materials. We understand the importance of a compelling proposal that clearly articulates the problem statement, proposed solution, and expected outcomes while providing evidence of SAHT's capacity to deliver results. Our team reviews and edits the proposal to ensure it is well-written, coherent, and aligns with RFP requirements. We leverage visual aids and compelling narratives to effectively convey SAHT's objectives and secure funding. SAHT personnel will receive a

copy to review, adhering strictly to timelines/deadlines throughout the process. Our team ensures timely application submission by managing and monitoring all tasks related to information and data gathering, writing, revisions, editing, and pre-submission tasks in accordance with the proposal development plan.

- **Preparing applications for submission:** At Ascend NBS, we offer comprehensive grant proposal writing services to include participating in pre-submission/NOFA webinars on behalf of SAHT to stay informed on the latest requirements, expectations, and eligibility criteria. This will enable us to develop competitive grant applications that meet all the necessary requirements. Our team researches required and suggested background documents, promising practice programs, and prepares budgets and budget narratives to sufficiently fund the activities of the project in compliance with all government and funder regulations. We design graphs, charts, and visuals that illustrate and explain key processes, programmatic concepts, and cycles of work/timelines as required by the RFP. Furthermore, we initiate, develop, and document the scope of grant project-related partnerships with community organizations as required by the funder. We also secure required supplemental documentation, including drafting and collecting signed copies of letters of support, and other documents including memoranda of understanding or articulation agreements that correspond to the project description in the proposal.
- **Submitting grant applications:** Our team ensures timely application submission by managing and monitoring all tasks related to information and data gathering, writing, revisions, editing, and pre-submission tasks in accordance with the proposal development plan. Ascend NBS submits the final proposal after approval by SAHT management team via print or online submission to ensure receipt before the deadline and in compliance with all proposal preparation requirements. We provide digital and paper copies of complete proposals for SAHT personnel and notify applicable partners of grant proposal submission. We also follow up with the funder as necessary to provide additional information or answer any questions.

At Ascend NBS, we believe in a collaborative approach to grant writing, which involves active participation from all stakeholders in the grant application process. Our approach includes the following steps:

1. Establishing Clear Roles and Responsibilities: We work with SAHT to identify key stakeholders and establish clear roles and responsibilities for each team member and backup personnel should someone not be available. This helps ensure that everyone understands their role in the grant application process and knows what is expected of them. A document with this information is disseminated to all parties.
2. Project Management Strategies: Monday.com is the cloud-based project management platform Ascend NBS uses to plan, track, and manage projects effectively. Monday.com

provides a centralized workspace where team members can collaborate, share information, and monitor progress in real-time. The platform features a highly visual interface that allows users to organize tasks and workflows using customizable boards, timelines, calendars, and other visual tools. Additionally, users can invite external stakeholders to join projects and collaborate in real-time. We can assign tasks, share files, and communicate through comments and mentions.

3. Communication and Coordination: We use communication and coordination tools, such as monday.com, Zoom, email and telephone to keep everyone informed and on track. We regularly update the project timeline, assign tasks and deliverables, and monitor progress to ensure that everyone is working towards the same goals.
4. Regular Meetings: We hold regular meetings with staff and stakeholders to discuss progress and address any challenges or concerns. This helps ensure that everyone is working together effectively and that any issues are addressed in a timely manner.
5. Training and Support: We provide training and support to staff and stakeholders on the grant application process if requested.
6. Document Sharing and Collaboration: We use online document sharing tools like Monday.com, email, and Dropbox to ensure that everyone has access to the same information and can collaborate on grant proposals in real-time.

Our approach and methodology are tailored to empower SAHT in achieving its funding objectives. Through strategic collaboration, rigorous analysis, and meticulous proposal writing, we are confident in our ability to secure funding and drive positive outcomes for residents in need of creative housing solutions.

Organizational Background

Ascend Nonprofit & Business Solutions® (NBS) LLC is a San Antonio, Texas headquartered, Hispanic, and woman-owned grant writing firm that specializes in grant training, coaching, research, and writing for clients nationwide. We help nonprofits, government entities, K-12 schools, higher education institutions, and businesses improve their grant writing skills and secure funding for their missions. Ascend NBS has been providing services requested by this RFP as an LLC, S-Corporation for five years, established in March 2019.

Ascend NBS is a certified WOSB, NMSDC, WBE, MBE, ESBE, SBE, and HUB that understands SAHT's needs. We are well-positioned and experienced to provide grant researching, developing, writing, preparing, and submitting successful grant proposals to raise both public and private funds in support of creative housing solutions for inequitably disadvantaged populations. We work with organizations across the country, giving us a broad understanding of the funding landscape and the types of grants that are available to different types of organizations. Our grant management strategies prioritize high throughput with quality, helping organizations streamline their grant writing and review processes and increase their chances of

securing award-winning grants. Thus, by leveraging our collective expertise and experience, Ascend NBS can help SAHT increase grant funding and improve its capacity to deliver high-quality programs and services to the local community.

Focus areas we have written and secured funding for include, but are not limited to, the following:

Small Business	Community Health	Workforce Development
Children and Youth	Mental Health	Community Improvements
Recidivism	Economic Development	Science
The Arts	Health and Human Services	Specialized Learning
Sustainable Projects	Capacity Building	Affordable Housing
Microlending	Community Development	Engineering
Financial Literacy	Community Development Block Grants	Census 2020
Disaster Relief	Parks and Recreation	Downtown/Community Revitalization
Education	Biomedical Devices	Veterans

Ascend NBS has had the privilege of collaborating with numerous nonprofits across a diverse spectrum of services and focus areas, all dedicated to assisting populations that align closely with those SAHT serves. From organizations supporting people with various forms of disabilities to those aiding persons experiencing homelessness, former foster youth, transitioning veterans, older adults, and other inequitably disadvantaged populations, we've had the opportunity to contribute our expertise and support to a wide range of causes. Through these partnerships, we've gained invaluable insights into the unique challenges and needs faced by these communities, allowing us to tailor our grant writing approach to effectively address their specific concerns and advance their missions. We understand the importance of ensuring equitable access to resources and services for all individuals, and we remain committed to empowering organizations like yours to make a meaningful impact in the lives of those you serve. Some examples of the services provided to other clients that align with SAHT's scope of work include:

New Earth for Los Angeles County and Culver City
Client Contact: Yana Simone-Grammer, Co-Founder
Email: ysimone@newearthlife.org
New Earth is a nonprofit organization committed to significantly reducing youth recidivism and re-incarceration by providing education, arts, jobs, internships, counseling, mentorship, post-

release reentry services, youth diversion, and wraparound support services to system-involved youth annually in Los Angeles County in collaboration with LA County and the Culver City Police Department. They offer these programs on-site at Los Angeles County schools and probation facilities, and at the New Earth Campus in Culver City, California. Ascend NBS provides grant planning and strategy, grant application development and writing, grant monitoring and reporting, budgets, internal training materials development, identification of relevant grant opportunities, and development of grants management best practices for New Earth to secure contracts and grants to serve Los Angeles County and Culver City. Funding supports New Earth's transformative programs that reduce barriers to employment for justice and system-impacted youth and young adults in Los Angeles County, breaks poverty cycles, and reduce crime for communities. Ascend NBS has helped New Earth secure $1.9 million in contracts and grant funding since 2022.

Community First Health Plans for Bexar County

Client Contact: Judy Razo, Executive Director

Email: jrazo@cfhp.com

For nearly 30 years, Community First has been providing evidence-based, person-centered care for STAR, CHIP, and STAR Kids Members in the Bexar County Service Delivery Area. Ascend NBS services included grant planning and strategy, grant application review, development, and writing for Community First to deliver high-quality integrated care to over 205,000 individuals in Bexar County. Their model enables them to identify low, moderate, and high-risk Members and address their healthcare needs. Through their collaborative approach with local government, Community First is driving optimal outcomes and contributing to a healthier community. Ascend NBS helped Community First secure a $3 million contract from the State of Texas for Bexar County service area in 2023.

U.S. Army's Institute of Surgical Research

The Institute of Surgical Research (ISR) is a research institution within the U.S. Army Medical Research and Materiel Command (USAMRMC). It is located at the Fort Sam Houston army base in San Antonio, Texas. Services included grant planning and strategy, grant application development and writing, grant monitoring and reporting, development of benefit-cost analysis, internal training materials development, identification of relevant grant opportunities, and development of grants management best practices for the research and development of medical treatments for combat-related injuries, including those sustained on the battlefield. Funding was intended to improve the medical care provided to service members and veterans who have been injured in the line of duty. Our Founder & CEO helped ISR raise $89 million over four (4) years.
Since 2019, we have secured over $175 million in funding for our diverse range of clients.

The table below represents only a sample of the secured awards for a few of our clients. We have an extensive list of awarded grants and contracts over the last three years.

Project Title	Funding Source	Date Awarded	Grant Award Amount	Client
COVID Vaccination and Recovery	Minnesota Department of Health	3/27/2023	$90,000	South Sudanese Foundation
Second Chance Act Improving Reentry Education and Employment Outcomes	Bureau of Justice Assistance	9/30/2023	$750,000	National Center on Institutions and Alternatives (NCIA)
General Operating	Kronkosky Charitable Foundation	9/30/2023	$325,000	Any Baby Can
Signature Program for Infrastructure Jobs	Department of Labor	10/1/2023	$2,000,000	Capital Idea Houston
General Operations	Baptist Health Foundation	11/21/2023	$75,000	Children's Bereavement Center

Summary of Qualifications

Ascend NBS brings to the table five years of dedicated service in the industry. Furthermore, the Ascend NBS team boasts a collective experience of 85 years in grant strategy, research, writing, reporting, and management. Ascend NBS' founder and CEO, Arlene Siller, PhD, has over 20 years of experience in successful grant writing and management. Her team is made up of a Chief Operations Officer with ten (10) years of grant management experience to include reporting and compliance to foundations, corporations and government entities; a Grants Manager with over 10 years of experience in grant writing and management and has worked with a variety of organizations, from nonprofits to the government as a contractor; a Grant Coordinator, with over 5 years of experience in grant coordination working with nonprofit organizations and businesses of all sizes; two Virtual Assistants who provide administrative, technical, or creative assistance to the team; and nine (9) contract Grant Researchers and Writers with tenure from four months to four years, responsible for research, writing, and submitting grant proposals to secure funding for organizations. Our team has a range of bachelor and master's degrees in English Language and Literature, Journalism, Communications, Economics, and degrees in STEM.

Dr. Siller's resume is attached. Other resumes are available upon request.

ARLENE SILLER

210-610-2440 | Arlene.Siller@ascendnbs.com | www.ascendnbs.com | LinkedIn Profile

GRANT WRITER | GRANT WRITING PROFESSIONAL | GRANT TRAINING EXPERT

Your Ally for Social Change

Grant writing leader that specializes in managing a team of grant writers committed to your organization's mission, priorities, and program effectiveness that genuine partnerships bring. Thought leader committed to efficient grant writing processes focused on submitting the best grants possible in support of award. Conscientious leader leveraging an expert team to save you time and money. Transformational leader committed to diverse perspectives in crafting your organization's story that invites philanthropists to advance your mission. Inspirational leader passionate about supporting capacity building and leadership development for BIPOC-led nonprofit organizations.

Core Competencies

Grant Writing	Grant Research	Grant Training
Grant Funding Strategic Planning	Grant Evaluation	Grant Consulting

Sectors of Experience

Affordable Housing	Diabetes	Prenatal Care
The Arts	Economic Development	Recidivism
Biomedical Devices	Education	Science
Capacity Building	Engineering	Small Business
Children and Youth	Financial Literacy	Smoking Cessation
Community Development	Health and Human Services	Specialized Learning
Community Improvements	Mental Health	Women
Community Health	Microlending	Workforce Development
Census 2020	Minorities	Veterans

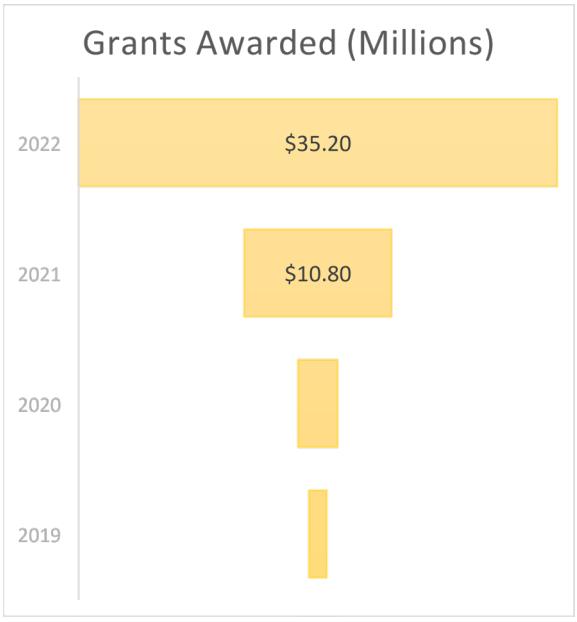
Professional Experience

Ascend Nonprofit and Business Solutions LLC March 2019—Present

Founder & CEO

"True philanthropy requires a disruptive mindset, innovative thinking and a philosophy driven by entrepreneurial insights and creative opportunities." Naveen Jain.

- Leads a Latina, woman-owned grant writing firm that supports nonprofits, government, and schools in fundraising through grants. Secured $175M in awarded grant funds to date.
- Manages a team of grant writers who work on multiple grant opportunities simultaneously. The team approach provides a holistic vantage point to ensure all applicable grant opportunities are pursued.
- Facilitates networking, collaboration, and cultivation of authentic and collaborative partnerships benefiting the community.
- Develops a deep understanding of the intricacies of the client's organization and programs to submit exceptional proposals.
- Coaches and trains hundreds of fundraisers to increase their fundraising capacity through Grant Yourself Success® an 8-week masterclass in grant story telling.
- Works with Chief Executive Officer (CEO), Executive Director (ED), and Chief Development Officer (CDO) on achieving grant fundraising goals.
-



LiftFund Inc. November 2014-February 2019
Vice President of Grants Administration

- Executive-level fundraising officer of grants ensuring annual operational revenue in the range of $5M-$9M annually through grants across a 13 state, 15 city footprint.
- Secured approximately $35M in grant funding over five years from corporations, foundations, and government. Worked closely with CEO and Chief Advancement Officer, liaison to board development committee and oversaw grant development staff and interns.
  - 2019 $500,000 U.S. Economic Development
  - 2019 $1.2M JPMorgan Chase & Co.
  - 2018 $1.2M Woodforest National Bank
  - 2017 $916,905 for U.S. Treasury's
  - 2016 $4.6M grant from JPMorgan Chase & Co.
  - 2015 $1M grant award from HUD

Dental and Trauma Research Detachment at U.S. Army Institute of Surgical Research August 2010—March 2014
Scientific Program Coordinator

- Program coordination for microbial biomedical research and the formulation and manufacture of Anti-plaque Chewing Gum, under the Food and Drug Administration's Investigational New Drug program for a Phase 1/2a clinical trial. Secured $19.2M in funding.
  - 2014 $2.2M U.S. Army Core Research Intramural Funding
  - 2012 $1.5M Defense Health Program
  - 2011 $3.0M Defense Health Program
  - 2011 $1.1M National Institutes of Health

National Research Council at U.S. Army Institute of Surgical Research July 2007—August 2010
Postdoctoral Research Fellowship

- Biomedical research and material evaluation for orthopedic applications
- $141,000 National Research Council, Research Associateship Program

Southwest Research Institute (SwRI®) April 1996—May 2003
Research Scientist/Chemical Laboratory Supervisor

- Biomedical research to develop and bring to market advanced biomaterials for medical applications.
- Secured over $2M in funding from commercial, government and internal funding sources.
- Developed novel keratin biomaterials which resulted in 10 issued United States Patents.

Education

Doctor of Philosophy Biochemistry | University of Texas Health Science Center at San Antonio

- *Secured $135K in grant funding from National Institutes of Health*

Bachelor of Science, Biology & Psychology, Chemistry minor | Texas State University

Community Service & Civic Engagement Experience

Social Venture Partners San Antonio, Board Member	2020—present
Latina Leadership Institute, San Antonio Hispanic Chamber of Commerce	2020—present
Grant Professionals Association, Member	2020—present
Association of Fundraising Professionals, Member	2020—present
The Nonprofit Council (TNC) and Business Influencers Group within the TNC, Board Member	2019—present

References

Children's Bereavement Center of South Texas

- **Contact:** Kristina Hernandez
- **Title:** Development Director
- **Contact Information:** khernandez@cbcst.org, (210) 736-4847, ext. 233
- **Dates Services Completed:** 2020 – Present
- **Description of role:** Provided professional and technical grant writing services aimed at enhancing Children's Bereavement Center of South Texas' bereavement support programs citywide. Ascend NBS successfully secured funding for the organization through a series of grant applications developed and submitted on behalf of the Children's Bereavement Center.

Capital Idea Houston

- **Contact:** Michelle Paul
- **Title:** Executive Director
- **Contact Information:** mpaul@capitalideahouston.org, (832) 280-5343
- **Dates Services Completed:** 2020 – Present
- **Description of role:** Developed a comprehensive grant strategy aligned with the organization's mission and goals. Conducted grant research to identify funding opportunities supporting economic development, education, and workforce training. Provided assistance in grant application development and review, ensuring the alignment of projects with the strategic goals and objectives identified by the Capital Idea Houston. Secured grants to support program expansion and additional staffing, addressing key priorities identified by Capital Idea Houston.

South Sudanese Foundation

- **Contact:** Matuor Alier
- **Title:** Executive Director
- **Contact Information:** matuor20@gmail.com, (484) 366-3285
- D**ates Services Completed:** 2020 – Present
- **Description of role:** Devised a comprehensive strategy and provided mentoring on grant readiness and fundraising to enhance organizational capacity and sustainability. Conducted grant research to identify resources supporting economic development, public safety policy, and community infrastructure. Developed and reviewed grant applications to ensure competitiveness and responsiveness to grant program requirements, resulting in increased revenue, improved governance, and strengthened community partnerships.

MWBE

Ascend NBS is a certified WOSB, NMSDC, WBE, MBE, ESBE, SBE, and HUB. Our certifications are attached.

Ascend NBS is committed to promoting diversity, inclusion, and equal opportunity in our business practices. As part of this commitment, we have developed this Affirmative Participation Plan to outline the affirmative steps we will take to ensure the inclusion and utilization of minority businesses, women's business enterprises, and labor surplus area firms whenever possible.

Affirmative Steps: We will actively seek opportunities to involve small and minority businesses, as well as women's business enterprises, in our procurement processes. Whenever they are potential sources for goods or services needed, we will ensure they are solicited. To maximize the participation of small and minority businesses, and women's business enterprises, we will, when economically feasible, divide total procurement requirements into smaller tasks or quantities. This approach will encourage broader participation and provide opportunities for these entities to compete effectively.

Utilizing Assistance: We will actively engage with organizations such as the Small Business Administration (SBA) and the Minority Business Development Agency (MBDA) of the Department of Commerce to seek guidance and support in identifying qualified small and minority businesses, as well as women's business enterprises. We will leverage their expertise to strengthen our supplier diversity efforts.

This Affirmative Participation Plan reflects Ascend NBS's dedication to fostering diversity, equity, and inclusion in our business operations. We are committed to implementing these affirmative steps to ensure that minority businesses, women's business enterprises, and labor surplus area firms have meaningful opportunities to participate in our procurement processes. Through these efforts, we aim to promote economic growth, innovation, and a more inclusive business community.

South Central Texas Regional Certification Agency of Bexar County, Texas hereby duly affirms that:

Ascend Nonprofit & Business Solutions, LLC

has successfully met the established requirements of SCTRCA's Business Enterprise Certification Program to be certified as a

*ESBE HABE MBE SBE WBE

Certified NAICS Codes

NAICS 541611: ADMINISTRATIVE MANAGEMENT AND GENERAL MANAGEMENT CONSULTING SERVICES
NAICS 541611: STRATEGIC PLANNING CONSULTING SERVICES
NAICS 541690: OTHER SCIENTIFIC AND TECHNICAL CONSULTING SERVICES
NAICS 561410: DOCUMENT PREPARATION SERVICES
NAICS 611430: PROFESSIONAL AND MANAGEMENT DEVELOPMENT TRAINING
NAICS 711510: INDEPENDENT TECHNICAL WRITERS

Certification Number: 223014763
Effective Date: January 23, 2023
Expiration Date: January 31, 2025

Sandra Ramos
Executive Director

Note: This certificate is the property of the South Central Texas Regional Certification Agency and may be revoked should the above named firm graduate from or fails to comply with SCTRCA's Business Enterprise Program. A Certification Renewal Application is required every two years.

Proposed Cost Structure

Our proposal encompasses a comprehensive approach to grant writing that combines innovative strategies with efficient resource allocation to deliver exceptional results within the budgetary constraints. We charge hourly for our services and will work with SAHT to not exceed a certain dollar amount. The estimated cost for one large government grant application requiring approximately 50 pages of narrative and 25+ of attachments to support the narrative is $8,950 for up to 70 hours of grant writing services. Cost will vary based on type of grant application, agency, requirements of proposal, and time spent.

Ascend NBS uses Monday.com and timesheets.com to track team member's time and expenses for various projects. The platforms are designed to help streamline billing and invoicing processes, as well as manage project costs and budgets. Team members can log their time and expenses for each task they work on. The platform allows users to track their time in increments of tenths of an hour or quarter hour. By utilizing a structured approach and leveraging our technology, we are able to deliver high-quality services at competitive rates. Our transparent pricing model ensures that there are no hidden costs or unexpected expenses, providing you with peace of mind and financial predictability throughout the duration of the contract.

Detailed Cost Breakdown

For agreements based on actual hours expended, the following hourly rates shall apply:

Program/Project Manager	$175.00
Grant Manager	$150.00
Lead Grant Writer	$135.00
Grant Coordinator	$120.00
Grant Writers	$115.00
Virtual Assistant	$50.00

Using QuickBooks online, Ascend NBS will provide an invoice to the SAHT at the end of the billing period. Ascend NBS shall submit an invoice every two weeks of each invoice period with a 30-day net payment term.

The itemized invoice will include:

- Specify the service performed by Contractor.
- Indicate the labor cost (number of hours) allocated to each task.
- Show the cumulative cost for all tasks performed to date.
- Provide any additional information and data requested by the Client as deemed necessary to properly evaluate or process Contractor's claim.

Payment may be remitted by electronic fund transfer/deposit, ACH, Bill.com, or other payment processing software made payable to Ascend NBS.

Our financial proposal for grant writing services is designed to provide maximum value, innovation, and cost-effective implementation for your organization. We are confident that our experienced team and innovative approach will help you secure the funding you need to achieve your goals and make a lasting impact in your community. Thank you for considering our proposal, and we look forward to the opportunity to work with you.

Statement of Concerning Insurance

We confirm that Ascend NBS has in place general liability insurance, worker's compensation insurance, and professional liability insurance. These essential insurance policies provide comprehensive coverage and protection for our team members and clients. We prioritize safety, professionalism, and accountability in all our operations, and maintaining adequate insurance coverage is integral to fulfilling our commitments and responsibilities effectively.

Statement of Concerning Conflict of Interest

We affirm our commitment to transparency and integrity in all aspects of our work. As such, we disclose any potential interests or affiliations that may impede or interfere with our ability to fulfill the duties and responsibilities associated with providing grant writing services. Any conflicts of interest will be promptly identified and addressed to ensure that our focus remains solely on delivering exceptional service and advancing the objectives of our clients.