

# Recruiting & Retaining Staff and Procuring Professional Services in Post-COVID World

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# Presenter

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# About Capital Access

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- Consulting and operations firm with over 25 years of experience in housing, community, and economic development
- HUD technical assistance (TA) provider since 2000
- Provided TA and direct support to 18 CDBG-DR and MIT clients in the past five years by assisting with building capacity, developing tools and systems, and procuring services to support CDBG-DR and MIT program launch
- Expertise in CDBG, Disaster Recovery (HMGP, CDBG-CV, CDBG-DR, MIT), HUD 108, HOME, ERA and ARP programs



# Common Procurement Questions for Administrative Services

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- How do I write a scope of services or job description for a role that our agency has never filled before?
- Did I remember to include everything that is required to go into a professional services RFP?
- How do I determine what costs are “necessary and reasonable” for the proposed services or positions?
- What is the appropriate procurement method? Some of the services sound like construction.
- Can I piggyback on an existing contract?
- What if I have inadequate competition for my RFP?

# Implementation Planning

- Under the Federal Register Notices that govern CDBG-DR allocations, grantees are required to create an Implementation Plan that serves as a self-assessment for program and project management capacity
- HUD created a CDBG-DR Toolkit that provides guidance on how to perform this assessment (click on the “Capacity” tab):  
<https://www.hudexchange.info/programs/cdbg-dr/toolkits/program-launch/>
- Capital Access’s recommended approach to doing this assessment includes three steps:
  1. Organizational chart
  2. Staffing budget template
  3. Work plan





# What steps should you take before issuing an RFP for staff augmentation?

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- Review organizational charts and implementation planning guidance for your agency and any project partners
- Develop a scope of services
- Do a cost estimate to determine your budget
- Identify what expenses can be allocated upfront as administrative, planning and activity delivery costs, respectively
- Create a template for a pricing proposal that can serve as the guide for invoicing
- Develop evaluation criteria and identify if there are preferences or scoring incentives for M/ W/ DBE firms
- Develop a contract template that includes all federal, state and local terms

# Staffing Roles and Job Descriptions

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- Staffing needs should be informed by organizational chart and implementation plan needs
- Consider developing a new job classification specific to your program rather than relying on an existing generic one to help you attract more appropriate candidates
- Developing a job description is a “Goldilocks exercise”—it should contain enough information to inform and attract motivated candidates but not be so detailed that it sets the bar too high or implies the position requires too much or will be micromanaged
- Consider opportunities to combine, cross-train or evolve positions over the life cycle of your program tasks and needs



# Planning for Change and Growth

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- Not every position should be marketed as a promotional opportunity—some roles need to provide consistent and repetitive functions
- Identify part-time needs and where they may be combined to create a full-time position, so long as the skill sets and tasks are complementary and the position reports to a single manager
- The implementation planning expenditure projection for staffing budgets provides the opportunity to identify where a position could evolve from one set of duties to another as program activities progress
  - For example, a program underwriter who is familiar with the project requirements and is best suited to oversee the implementation of those requirements over time
- Build redundancy within positions and cross-train skillsets because staff turnover WILL occur—aim to create resilience within your team





## Additional Considerations for Procuring or Hiring Administrative Support

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- Develop clear performance metrics for each position or contract to communicate what success looks like for the role
- Conduct regular evaluations of staff and/or consultants with customized feedback to promote professional development, increase production or just express appreciation
- Check your agency's rules and timelines for employee probation to ensure that staff who are not a good fit don't inadvertently become permanent employees
- Healthy competition and incentives can be a great tool to achieve program goals

# Looking Outside of Your Org Chart

- If you don't have the time, resources or ability to staff or procure for a need in-house, consider other state divisions, agencies, UGLGs, or nonprofits that might already have the capacity, staff or budgets to satisfy your program needs.
- Examples:
  - Allocating part of your admin budget to another agency that has environmental reviewers who can be leveraged through an MOU or interagency agreement
  - Sharing your planning budget with regional planning groups to assist with planned development and needs and to provide a certain level of compliance capacity to local government subrecipients
  - Partnering with a nonprofit subrecipient to provide income certification or QC functions for housing activities

# Questions?

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# Thank You!

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