JAMES MICHAEL CARTER

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Director Hafsa Kaka,

I am writing to express my deep interest in serving as your Deputy Director in the Homelessness Strategies and Solutions Department. Over the past two decades, I have amassed a unique combination of leadership skills, professional achievements, and subject-matter expertise. My combination of experiences can elevate the capacity of your team's charge to make homelessness rare and non-recurring for San Diegans by collaboratively implementing and strengthening the City's Community Action Plan on Homelessness.

My management successes and professional experiences are highlighted in my resume. If chosen to serve alongside you as Deputy Director, I will focus on opportunities to build a team culture of excellence in meeting the needs of those experiencing homelessness by presenting creative evidence-based solutions to anticipate, respond to, and solve critical issues for vulnerable San Diegans. In this spirit, this cover letter illustrates how my experience meets your expectations for a Deputy Director, as described in the posted position description of an "ideal candidate."

Strong leader and administrator knowledgeable of best practices and understands the urgency to create housing solutions

Without reliable housing and physical security, one's ability to self-resolve life's challenges (e.g. mental illness, substance abuse, low wages, etc) can be insurmountable - especially for vulnerable individuals. Since the beginning of my career in municipal government, I have become increasingly knowledgeable of Housing First principles as being essential to long-lasting housing solutions. Even more so, I have kept up-to-date on emerging best practices deployed in other regions, and I keep an eye out for barriers to optimal outcomes.

As an associate city administrator in Washington, DC, I was coached, and myself became skilled, in the management technique of inspiring a sense of urgency in bureaucratic environments. Establishing a collective sense of urgency moves efforts forward faster. I was part of leadership team focused on House First initiatives. The team's efforts resulted in 475 individuals moving into supportive housing in a little over a month. More recently, through my contributions to the RTFH Standards and Measures Ad Hoc Committee (chaired by County Supervisor Nathan Fletcher), I ensured the committee recommendations elevated the importance of performance targets for provider services. We could not expect every provider to produce perfect performance every year. Nonetheless, in setting targets we could expect every provider to make progress every year as part of San Diego's collective effort to prevent and end homelessness.

Innovative, passionate, strategic, and articulate leader with the ability to help lead a diverse public sector organization

During my service (in Washington, DC; Portland, OR; and San Diego), I have demonstrated success leading diverse and complex public sector agencies.

In DC, as associate city administrator for 14 health and human service (HHS) agencies no operational challenge fell within one agency silo. I lead multi-agency reform efforts which resulted in innovations in how the HHS agencies implemented family-centered strategies and programs. I helped lead the team that developed the framework for these innovations. Our efforts were codified in legislative reforms focused on information sharing to improve services and achieving family preservation through case coordination.

In Portland, I launched the performance accountability program. The program centered on working sessions facilitated by executives focused on a single issue. The initial series of working sessions focused on affordable housing development and the half-dozen city bureaus who were accountable stakeholders. This innovation introduced by me to the Portland expanded to address a diverse set of operational deficiencies.

Five years ago, San Diego's former Chief Operating Officer (Scott Chadwick) tapped me to lend operational and analytic support to Mayor Faulconer's first senior advisor on homelessness. I co-facilitated the convening of City leads on housing solutions. The departments engaged included: Library, Parks & Rec, Economic Development, Police Department, Fire-Rescue Resource Access Program, ESD, Transportation-Stormwater, Real Estate Assets, and DSD. It was a challenging time months prior to the Hepatitis A outbreak. Even though the group's ability to sustain momentum slowed because each department had

competing priorities, I was nonetheless able to help structure potential solutions raised by the group. These solutions ultimately took the form of a skeleton work plan. Elements of this work were reflected in the City's Connect-Support-House strategy which partly informed the Community Action Plan on Homelessness.

Track record in strategic planning and proactiveness and purposeful in creating decision-focused and action-focused

Throughout my career, I have drafted department-level tactical plans and have also been a thought leader in system-level strategic planning. For example, I assisted the child welfare and juvenile justice agencies in Washington, DC in their annual performance plans. On a systems-level, I co-authored a child abuse and neglect prevention plan. Moving elements of that plan from inception to completion required my leadership in designing an early intervention program to prevent child abuse and juvenile delinquency. Additionally, part of my leadership role promoting performance management in the City of San Diego is providing technical assistance to departments' development of tactical plans. I have assisted dozens of new and existing departments in their plan development and advocated for the inclusion of metrics to indicate progress towards meeting goals and objectives in those plans. I have observed that well-intentioned planning falters in the absence of action-oriented strategies; a notable aspect of my strategic planning approach is anticipating barriers to plan implementation.

To date, a noteworthy example of my proactiveness was seeking out a County partnership to improve the uptake of County services by bridge shelter occupants (pre-COVID). I connected with my counterparts at the County Office of Business Intelligence to develop a workplan for data analysis. I developed a process to crossmatch City and County program enrollment data (with provisions that preempted concerns of client confidentiality). This effort resulted in a City-County MOU, which can be adapted for future collaborative efforts with the County.

Commitment to continuous improvements to the community's homelessness response system, effective communication and interpersonal skills to build strong working relationships

In 2015 when my family relocated to San Diego, I was eager to learn about San Diego's homeless response system. I was committed to taking what I learned in DC and Portland (and from graduate research) to identify potential improvements for the San Diego system. In my first City assignment at the Department of Finance, I requested that my work responsibility include SDHC, Parks & Rec, and Economic Development. Understanding budgets was key, and through those efforts, I established relationships with the SDHC's finance team. Additionally, I attended meetings of the Regional Continuum of Care Council and SDHC board meetings. Transitioning to PandA, I built working relationships with regional partners - for example, David Estrella (County), Camey Christenson (CIE/211), Kris Kuntz and Brian Gruters (former LeSar consultants), Hanan Scrapper (PATH), Omar Passons (County), Leslie Wise (Built For Zero), Alonso Vivas (Clean and Safe), Dorothy Thrush (County Public Safety Group COO), and Ryan Baxter (County HHSA data management). In all efforts, I effectively establish and maintain relationships to gain confidence and trust in my ability to lead groups toward a common goal.

Through my relationships in the City of San Diego, my colleagues have noted my intangible leadership qualities. Notably, my leadership style has been described as follows:

- "Excellent at predicting problems and a creative thinker on how to create positive change"
- "Highly ethical, trustworthy, and makes decisions with integrity and city's best interest in mind"
- "Calm and patient, excellent in dealing with difficult personalities, always motivated for success"

In summary, I have always possessed a sense of urgency to promote government innovation in a manner that ensures residents have access to quality services delivered to the highest standard. This is especially important for our neighbors experiencing homelessness. I look forward to further discussing my role in growing HSSD's and the City' capacity to end homelessness.

Sincerely yours,

Attachment: resume & professional references

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James M. Cartee

RESUME PROFESSIONAL LEADERSHIP EXPERIENCES

(chronological order past to present)

EXECUTIVE OFFICE OF THE MAYOR, Office of the City Administrator (OCA)

Associate City Administrator (Program Manager); Washington, DC (2007–2011)

Responsibilities: Promoted to direct the work of the OCA Health and Human Service team of half-dozen analysts. Excelled in leading operational support and strategic planning for the reform of 14 health and human service agencies with a combined budget of \$3.2 billion and a 4,200-person workforce. Provided indirect supervision to 14 directors as proxy for the City Administrator and directly supervised a team of four senior analysts. Led budget development & execution process, performance evaluation, process improvement, and legislation and policy development for DC's juvenile justice, child welfare, public health, and housing agencies, as well as the non-profit intermediary funding after-school programs. Advanced interagency coordination of Mayoral initiatives.

Highlights of Achievements: (1) Elimination of child protective services backlog - successfully led process improvement design, operation and evaluation effort to eliminate backlog of investigations by child protective services. (2) Reduction of population at youth detention facility - designed process improvements and evaluation standards to reduce population pressures at youth detention facility. (3) Developed performance measures for and co-authored first-ever Child Abuse and Neglect Prevention Plan. (4) Improved licensing process - led effort to reduce the cycle time for foster care licensing. (5) Developed performance accountability tools - provided technical assistance to agencies to launch ChildSTAT for child welfare programs and YouthSTAT for juvenile justice programs. (6) Designed an early intervention program targeting youth status offenders to prevent their entry into the child welfare or juvenile delinquency system.

U.S. DEPARTMENT OF THE TREASURY, Office of Performance and Budget (OPB)

Senior Fellow, Performance & Budget Analyst; Washington, DC (2011)

Responsibilities: Led OPB budget development, budget execution, performance evaluation, and strategic planning for assigned departmental accounts and bureaus which had a combined budget of \$979 billion. Portfolio of accounts included small business initiatives, **community development funding**, and financial system reform. Collaborated with the Congressional Budget Office and White House on budget-related legislation.

<u>Highlights of Achievements:</u> (1) Recruited for Treasury Senior Fellows program to provide leadership and technical expertise to the Treas-STAT **performance accountability program**. (2) Championed incorporation of data analytics and visualization into the quarterly performance reviews convened by the Deputy Treasury Secretary. (3) Initiated the development of indicators and metrics to measure the impact of newly-established small business and **community development initiatives**. (4) Revised tabulation method that detailed the impact that Congressional legislation would have on the Treasury budget during the 2011 debt ceiling negotiations as well as during the approval process of the 2012 and 2013 budgets.

CRIME AND JUSTICE INSTITUTE (CJI) at COMMUNITY RESOURCES FOR JUSTICE *Senior Associate*; Portland, OR (2012–2013)

<u>Responsibilities:</u> Provided policy analysis and research services to practitioners, state legislators, and governors' offices in the juvenile corrections field. Engaged in data analysis, development of evidence-based policy options, and stakeholder education of best practices. Assisted in the development and implementation of legislative and communications strategies. Served as site lead, managing other associates, for juvenile justice initiatives in partnership with the Pew Charitable Trust Public Safety Performance Project (PSPP).

<u>Highlights of Achievements:</u> (1) Juvenile justice reforms in Georgia – supported the PSPP legislative effort that successfully culminated in the enactment of HB 242 (2013), which is projected to save the state \$85 million in averted juvenile corrections costs over the next 5 years from 2013 through 2018. (2) Helped to

create training curricula and led training in six states for the Annie E. Casey "deep end" reform initiative. The training focused on evidence-based practices, data-driven decision making, and organizational change to implement systemic change. (3) Juvenile justice reforms in Hawaii – co-facilitated the PSPP system assessment effort to identify factors driving increases in the out-of-home placement of low-risk juvenile offenders.

CITY OF PORTLAND, City Budget Office

Senior Financial Analyst; Portland, OR (2013–2015)

Responsibilities: Managed the implementation of Citywide projects and initiatives with a focus on performance measurement. Performed complex budgeting and performance analysis functions for bureau portfolio with a combined budget of \$314 million. Directly supervised two graduate interns and provided specialized coaching and training in performance management. Indirectly supervised junior financial analysts. Introduced tools to assess measurable, cost-effectiveness of city programs. Monitored operating budgets, grants, and capital projects for the housing development and homeless services bureau, city auditor's office, and economic development commission. Conducted research and analysis to develop recommendations for the Mayor and City Council.

Highlights of Achievements: (1) Financial modeling – developed in-depth analysis of economic development investments in city urban renewal areas and tax-increment financing of affordable housing (2) Budget Mapping – facilitated the annual development of GIS maps detailing operating and capital budget investments and service delivery across city neighborhoods. (3) Citywide training – led workshops to train bureau staff on the principles and practical application of performance measurement theory and practice. (4) Data visualization – designed visual analysis of budget and performance data to inform decision-making by city leadership (for details visit www.portlandoregon.gov/cbo/performance).

CITY OF SAN DIEGO, Department of Finance

Senior Budget Development Analyst; San Diego, CA (2015–2016)

Responsibilities: Promoted from associate budget analyst to senior budget development analyst to hasten internal process improvements. Excelled in complex fiscal analysis, budget development, and monitoring for an assigned portfolio of departments and agencies, which had a combined operating budget of \$531 million. Portfolio included San Diego Housing Commission (SDHC), Economic Development Department, Redevelopment Agency, and Parks and Recreation Department.

Highlights of Achievements: (1) Annual technical Reviews – in-depth analysis of SDHC, Successor Agency/Redevelopment, Low and Moderate Income Housing Asset Fund, and Affordable Housing Fund budgets. (2) Climate Action Plan (CAP) Implementation Budget – coordinated the *first-ever* Citywide effort to tabulate new budget investments across each department implementing CAP strategies. (3) Budget Priorities Analysis – initiated the *first-ever* detailed analysis of City Council budget priorities included in the Mayor's proposed budget. (4) Zero-Based Budgeting Pilot – led the City's analysis of \$27.7 million Performance & Analytics Department and Facilities division budget to develop pilot process for implementing zero-based budgeting in City departments. (5) Recognized by peers as employee of the quarter for "tackling high profile assignments, interacting well with co-workers, and always striving for process improvements"

CITY OF SAN DIEGO, Performance & Analytics Department

Program Coordinator; San Diego, CA (2016-current)

<u>Responsibilities:</u> Promoted (via interdepartmental transfer) to performance management program coordinator to focus on the City's strategic planning and performance monitoring efforts. Selected by Chief Operating Officer to assist in **coordination and evaluation of Mayor's priority initiatives on homelessness** by performing data analysis, service provider assessments, and research on national practices. From 2016 to current, actively participate in the Regional Task Force on Homelessness (RTFH) committees.

Highlights of Achievements: (1) Homeless Strategies – completed policy analysis and process improvement recommendations related to landlord engagement and bridge shelter operations. (2) Homeless STATS dashboard – developed internal dashboard to report monthly stats on City-funded homeless programs. (3) Data Analytic projects – conducted rigorous analysis of the TSW backlog, sidewalk repair public liability, "inclusion & belonging" pilot pulse survey, and homeless shelters to name a handful (4) PerformSD Operational Framework: led Citywide initiative to use meaningful performance metrics to increase accountability and to inform resource allocation across twelve departments. (5) Mentorship – supervised six summer interns over 3 years and provided training and ongoing technical assistance to nearly 100 participants in the City's OpEx Academy for process improvement

VOLUNTEER LEADERSHIP EXPERIENCES

HUD REGIONAL CONTINUUMS OF CARE (CoC)

- Executive branch representative for Washington, DC CoC (2007-2011)
- Participant in Portland/Multnomah County (OR) CoC (2013-2015)
- Member of RTFH HUD NOFA Rating & Ranking Subcommittee (Winter Summer 2018)
- Member of RTFH Ad Hoc Committee for HMIS upgrade (Spring Summer 2018)

"POINT-IN-TIME" COUNTS (PITC)

Lead Volunteer, Washington, DC; Portland, OR; San Diego, CA (2008-2017). Volunteered in the annual census of individuals experiencing homelessness in unsheltered and sheltered environments.

RTFH: STANDARDS AND MEASURES AD HOC COMMITTEE

Working Group Member (2019). Served on a working group (chaired by County Supervisor Nathan Fletcher) to research and draft recommendations on how the San Diego Region could improve system performance which included proposing initial performance targets for providers.

SOCIAL ADVOCATES FOR YOUTH (SAY) - SAN DIEGO

Board Member (2016 – current) Volunteer for a local non-profit which works to help youth, adults, families, and communities reach their full social and economic potential. Serve on the Audit Committee and the Finance Committee with focus on cost-effectiveness of children and youth programs.

AD HOC COMMITTEE: ADDRESSING HOMELESSNES AMONG BLACK SAN DIEGANS

Community Member (2020 – current). Volunteer for the regional committee (co-chaired by Councilmember Sean Elo-Rivera) whose aim is to understand why Black people are overrepresented in San Diego's homeless population. Individual role focuses on data that indicates system-level racial disparities in access to services. Also advocating for statistical methods to adjust CES referrals to achieve equitable housing placement.

PROFESSIONAL CERTIFICATIONS

LEAN SIX SIGMA BLACK BELT (2019)

Completed 90 hours of curriculum (in addition to special project) to earn a specialized certification in quantitative and qualitative process improvement methods.

"SCRUM" AGILE PROJECT MANAGEMENT (2021)

Earned a "Professional Scrum Master I" certification in scaled agile, project management techniques that connect multiple teams who need to work together to deliver complex solutions.

ACADEMIC ACHIEVEMENTS

UNIVERSITY OF OXFORD (United Kingdom) Graduated in 2012 with a Master of Science in Evidence-Based Social Intervention and Policy Evaluation. Coursework highlights: community-based analysis and large-scale interventions, youth workforce training development, housing subsidy programs

HARVARD UNIVERSITY Graduated in 2006 with a Bachelor of Arts degree. Coursework highlights: social policy, bioethics, healthcare policy, public health, psychology of leadership and crime policy.

PROFESSIONAL REFERENCES

Dan Tangherlini

Managing Director at Emerson Collective dantangherlini@gmail.com 202-438-8803 (cell)

Direct professional relationship:

Deputy Mayor/City Administrator, Government of the District of Columbia Assistant Secretary of Management/CFO/Chief Performance Officer, U.S. Department of Treasury

Tamera Kohler

Chief Executive Officer, Regional Task Force for Homelessness (RTFH) tamera.kohler@rtfhsd.org 435-770-5009 (cell)

Casey Smith

Director, Fleet Operations Department CDSmith@sandiego.gov 619-251-3896 (cell)