

RISK MANAGMEENT, MANAGEMENT CONSULTING, AND FINANCIAL SUPPORT SERVICES

INDEFINITE DELIVER/INDEFINITE QUANTITY (IDIQ) FOR USDA SUPPORT SERVICES

Savan Group, LLC and RSM US LLP (Team Savan Group) has a positive history of supporting the U.S. Department of Agriculture (USDA) and other federal clients, including a successful record of accomplishment for providing management and financial support services.

CONTRACT VEHICLE INFORMATION:

Name: Multi-Family Housing Risk Assessment Management Services
 Contract no.: AG-31ME-C-16-0012
 Period: 9/26/2016 – 9/25/2021
 Point of Contact: Alberta Smith, Contracting Officer
 Email: alberta.smith@wdc.usda.gov
 Phone: 202-692-0265

SUPPORT SERVICES COVERED UNDER THIS IDIQ CONTRACT

Risk Management

- Risk Governance
- Risk Culture
- Risk Controls
- Risk Response
- Risk Measurement

Organizational Design

- Design Thinking
- Change Management
- Impact Analysis
- Strategic Planning
- Business Process Re-Engineering

IT Governance

- IT Impact Analysis
- IT Program Evaluation
- IT Investment Analysis
- IT Performance Measures
- IT Portfolio Assessment

Financial Performance Analysis

- Financial Planning
- Financial Decision Management and Support
- Financial Controls & Budgeting
- Federal Property Disposition

Outreach and Communication

- Briefings
- Workshops
- Multimedia tools
- Factsheets
- Newsletters

BENEFITS OF USING THE USDA TEAM SAVAN GROUP IDIQ

- Direct access to Savan Group and RSM professionals with years of support in management, risk, financial services, IT, outreach, communications, and other consulting improvement projects
- Quick and efficient procurement process that reduce potential delays due to contracting
- Competitive rates that demonstrative Team Savan Group's desire to support USDA with its mission critical activities

WHY TEAM SAVAN GROUP

ABOUT SAVAN GROUP

Savan Group, LLC (www.savangroup.com) is a leading consulting firm specializing in Strategy & Transformation, Information Technology, and People & Performance. Savan Group's mission is to be a premier and trusted consulting firm that helps clients achieve sustainable success by solving their most critical management, organizational, technical, and operational challenges. Savan Group is a SBA-certified, small business and GSA MOBIS schedule-holder.

ABOUT RSM

RSM US LLP (www.rsmus.com) is a leading provider of audit, tax and consulting services. We guide our clients through business challenges by understanding their needs and bringing together the right team to address them. With nearly 9,000 professionals and associates in 86 cities nationwide and access to more than 41,000 people in 120 countries through our membership in RSM International, we can meet your needs wherever in the world you do business.

- ▲ Fresh perspective—Team Savan Group brings a fresh perspective and an independent viewpoint to USDA.
- ▲ Quality client service—Team Savan Group brings a multi-perspective, best practice-based service offering with personnel specializing in management consulting, risk advisory, IT governance & analytics, and business process improvement for over 14 federal agencies, making it possible to bring more operational and regulatory insight to our relationship.
- ▲ Experienced personnel—A delivery team staffed by seasoned personnel with experience to provide cost-effective solutions, as well as provide industry best practices and observations to USDA Rural Development.

KEY DIFFERENTIATORS

- ▲ Expertise in multi- and single-family lender servicing compliance and counterparty risk assessments and ABS custodial reviews
- ▲ Extensive experience within large financial services companies, including GSEs, global and regional banks and their regulators, specialty finance lenders, mortgage brokers, life companies, and REITs.
- ▲ Supported GSE in managing and conducting operational and credit risk assessments of the servicing operations of global and domestic multi-family lenders.
- ▲ Supported the Office of Mortgage Settlement Oversight (OMSO) in monitoring and ensuring compliance of single-family servicing under the National Mortgage Settlement as well as the regulations issued by the Consumer Financial Protection Bureau.

SELECT PAST PERFORMANCE

1. Multifamily Servicing Risk Assessment

Team Savan Group was engaged by the leadership of USDA, Rural Development (RD) to conduct a risk review of the multi-family housing (MFH) servicing portfolio, including Section 515 direct loans (legacy) as well as Section 538 guaranteed loans and the properties securing them. The Team assessed the risks and practices associated with states not meeting servicing goals as it pertains to the Class C and D (problem) properties within the MFH direct loan portfolio. Additionally, the Team reviewed risks that negatively impact the effectiveness of communications. Additionally, Savan Group assessed risks that lessen RHS's ability to validate the lender's reporting of credit quality within the 538 program for properties with Low-Income Housing Tax Credits (LIHTC).

2. Residential Mortgage Servicing Operations, Analysis and Surveillance

RSM was one of eight approved vendors to the FDIC providing oversight for numerous Loss-Share Agreements the FDIC has entered into with various financial institutions acquiring failed banks. The FDIC has a philosophy stating that foreclosure is to be used as a last resort in resolving single-family residential (SFR) mortgage delinquencies. Their philosophy is contained within the policies, terms, and guidance imbedded into each Loss-Share Agreement. RSM tasks include sending out teams of specialists to review acquiring banks' mortgage servicing compliance under the various Loss Share Agreements. RSM reviewed over 288,000 loans totaling over \$50 billion on behalf of FDIC and were instrumental in aligning the actions of the loan servicers with the intent of the FDIC as outlined in their Loss-Share Agreement.

3. Residential Mortgage Default Servicing and Loss Mitigation Analysis

RSM was one of the firms selected to assist the federal government with the design and implementation of certain work streams related to the compliance function for a national loan modification and loss mitigation program for SFR mortgages. RSM was a trusted advisor to federal GSEs in their efforts to monitor compliance by its mortgage servicers under this program. In order to perform those duties effectively, RSM acquired a thorough understanding of mortgage default events and the terms and parameters for mitigating losses.

FOR MORE INFORMATION, PLEASE CONTACT

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