

TERRI MONTAGUE, ESQ.

McDonald Distinguished Senior Fellow & Senior Lecturer in Law
Emory University School of Law * Center for the Study of Law & Religion
Gambrell Hall (Office 313) * 1301 Clifton Road NE, * Atlanta, GA 30322-2770
terri.montague@emory.edu

PROFILE

Results-oriented, multi-disciplinary professional with progressive leadership and management experience in the community development, finance and real estate sectors, gained within for-profit, nonprofit, faith-based and government settings. Competencies include: public policy development and implementation; statutory and regulatory interpretation; research; complex organization and program management; community engagement; sustainability; legal and business due diligence; affordable housing finance, and real estate. Seasoned communicator, trainer, and facilitator. Experienced decision-maker, negotiator and problem-solver in diverse, multi-stakeholder environments. Licensed attorney, certified mediator, and Lean Six Sigma (Green Belt) change leader.

EDUCATION

Emory University, Atlanta, GA

Juris Doctor, Emory University School of Law.

- Directed Research Paper, *Towards Community Sustainability: A Rights-Based Perspective*

Master in Theological Studies, Candler School of Theology.

- Integrative Paper, *Realizing Sustainability: A Next Generation Paradigm*

Gordon-Conwell Theological Seminary, Charlotte, NC

Master of Arts in Religion (Christian Thought).

- Integrative Paper, *Minding Our Faith: A Developmental Framework for the Contemporary Context*

Massachusetts Institute of Technology, Cambridge, MA

Master in City Planning (Housing & Community Economic Development).

Master of Science in Real Estate Development.

- Thesis, *A Study on How Supportive AID Housing Programs In Select U.S. Cities Are Meeting the Special Needs Housing Challenge*

University of Chicago, Chicago, IL

Bachelor of Arts (Economics).

PROFESSIONAL EXPERIENCE - LEGAL

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT, REGION IV OFFICE OF COUNSEL, Atlanta, GA, Attorney-Advisor, 2016 – 2022.

Program Services attorney who provided legal interpretation, advice and services to program clients in the office(s) of Housing, Community Planning and Development, Public Housing, and the Departmental Enforcement Center on legal, program and regulatory questions. Identified and analyze complex, often unprecedented, legal questions and problems that implicate federal, state and local laws. Supported defensive litigation efforts. Closed on federally-assisted and FHA-insured residential, mixed-use, and healthcare transactions totaling \$1.14 billion, which provided or redeveloped 8,645 dwellings. Completed HUD-wide special assignments:

- In the Office of Deputy General Counsel for Housing Programs, developed guidance, principles, and tools to systematically embed equity and redress inequities in HUD policies and programs, pursuant to Executive Order 13985, “Advancing Racial Equity and Support for Underserved Communities Through the Federal Government” (86 FR 7009, January 25, 2021).
- In the Office of Legislation and Regulations, crafted the Department’s strategy and initial draft regulation to implement Executive Order 13891, “Promoting the Rule of Law Through Improved Agency Guidance Documents” (84 FR 55235, October 9, 2019).

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT, OFFICE OF GENERAL COUNSEL – OFFICE OF ASSISTED HOUSING AND COMMUNITY DEVELOPMENT, Washington, DC, Attorney-Advisor, 2014 – 2016.

Program Counsel for federal grant programs, including the 1+ billion HOME Investment Partnership Program (HOME), Housing Trust Fund (HTF) Program, and Section 4 and Rural Capacity-Building programs. Performed legal clearance reviews for legislative proposals, and regulatory guidance for the HOME Program, Housing Trust Fund implementation, and other cross-cutting policies. Identified and resolved legal issues, and assured the legal sufficiency of proposed rulemakings, grant funding announcements, FAQs, regulatory waiver determinations, and program guidance, and ensured their consistency with program statutes and regulations, and Departmental policies, standards and operating procedures. Researched and interpreted program statutes and regulations in response to complex and potentially controversial questions.

- Participated on cross-Department Working Group that advanced the President’s “smoke-free Public Housing” strategic priority. Lead Program Counsel and researcher who developed and proposed the initial HUD policy framework, crafted responses to Congressional inquiries and public comments, and co-wrote the “Instituting Smoke-Free Public Housing” Final Rule (81 FR 87430, published on December 5, 2016 and codified at 24 CFR parts 965 and 966), and the implementation guidance, Notice PIH-2017-03, “HUD Guidance on Instituting and Enforcing Smoke-Free Public Housing Policies,” issued on February 15, 2017.

SAVAGE, TURNER, PINKNEY & MADISON ATTORNEYS, Savannah, GA, Law Clerk, Summer 2013.

Prepared presentations and participated in mediations and settlement negotiations on plaintiffs' behalf. Researched, wrote and filed briefs and court motions in civil litigation actions, including private nuisance, wrongful death, landowner liability, medical malpractice, and wrongful foreclosure claims. Conducted client interviews, developed case files, briefed partners on key issues, and outlined potential legal arguments.

U.S. DEPARTMENT OF HOUSING & URBAN DEVELOPMENT, Region IV Office of Counsel, Program Services Division, Atlanta, GA, Legal Extern, Spring 2013.

Researched HUD regulations and MAP guidance and advised program clients on issues related to asset management, public housing, and community development and real estate law. Reviewed documents related to closing commercial development projects, multi-family FHA-insured loans and Capital Advance grants.

PROFESSIONAL EXPERIENCE – OTHER

ATLANTA BELTLINE, INC., Atlanta, GA, Founding President and Chief Executive Officer, 2006 – 2009.

Launched, led and ensured implementation of the City's 25-year, \$4.8+ billion transformative investment program that is enriching Atlanta's quality of life with parks, trails, affordable housing, transit, environmental remediation, and economic development. Oversaw strategic, financial and program implementation planning. Coordinated land acquisition, project management and development activities among public and private partners. Cultivated federal and philanthropic funders, and negotiated strategic partnerships and alliances. Developed Program performance metrics and monitoring tools. Negotiated land swaps and Right-of-Way acquisitions. Facilitated community consensus on competing or conflicting land use proposals. Developed, justified and advocated for budgets and public expenditures, and reported progress and deliverables against the approved Redevelopment Plan.

ENTERPRISE COMMUNITY PARTNERS, INC., Columbia, MD, President and Chief Operating Officer, 2001 – 2006.

Implemented program strategy and managed day-to-day operations of this national operating foundation and provider of capital and expertise in affordable housing and community development, with 260 staff in 17 cities and an annual operating budget of \$60+ million. Oversaw \$190+ million community development loan fund. Assured high-impact program and service delivery and directed and collaborated with regional and local field directors and staff to achieve annual plans, operating budgets and transaction targets, and evaluate and report program impact and organizational performance. Cultivated and managed strategic funding and program partnerships to support strategic priorities and regional and local programs, including the Green Communities Initiative, Supportive Housing, Maryland (ex-offender) Re-Entry Partnership, a School Reform initiative, and the Hurricane Katrina Recovery. Educated lawmakers, civic leaders and philanthropic partners on industry research, policy outcomes, best practices and proven affordable housing and community development solutions. Represented Enterprise and

the community development industry through Congressional testimony, conferences, and plenary speaking events.

LEND LEASE REAL ESTATE INVESTMENTS, INC./BOSTON FINANCIAL, Housing & Community Investing (HCI) Business, Boston, MA, 1992 – 2001.

Principal, Portfolio Management; Vice-President, Senior Portfolio Manager; Vice-President, Director of Investment Services; Assistant Vice President, Asset Manager; Real Estate Investment Analyst

Guided portfolio reporting function and asset management strategy for 9 retail and 20 corporate investment portfolios worth \$1.5+ billion tax credit equity. Collaborated with key business managers and staff to achieve the portfolio investment and profitability objectives. Negotiated and structured investment programs and reported investment performance. Underwrote transactions, prepared program proposals, and facilitated client due diligence and investment closings. Managed key institutional client relationships. Conducted property site visits. Negotiated asset and portfolio restructurings and property dispositions. Directed the newly-formed Investment Services team responsible for all facets of customer servicing, administration and fulfillment operations for over 40,000 retail investors, brokers and advisors. Raised and placed in excess of \$150MM annually of tax credit equity for development joint ventures using Low Income Housing Tax Credits (LIHTC) and Historic Tax Credits, on behalf of institutional investors.

SELECT FELLOWSHIPS & CONSULTING EXPERIENCE

Principal, **MONTAGUE & ASSOCIATES**, Atlanta, GA, 2009 – 2016. Provided advice and resources to executive leaders and organizations seeking to develop practical solutions and enhance mission impact in the areas of affordable housing, urban redevelopment, fund development, sustainability, organizational development, financial literacy, and community wealth preservation.

Sustainability Fellow, **EMORY UNIVERSITY, OFFICE OF SUSTAINABILITY/CENTER FOR COMMUNITY PARTNERSHIPS**, Atlanta, GA, 2010 – 2012. Researched and created tools to track sustainability-focused projects. Created local partnerships and service-learning opportunities for Emory faculty and students with Atlanta community organizations. Benchmarked Emory's sustainability strategy, programs, and communication resources against peer institutions.

Intern/Consultant, **U.S. ENVIRONMENTAL PROTECTION AGENCY**, Office of the Regional Administrator (Region IV), Atlanta, GA, Summer 2012. Created program assessment and interview tools and reviewed the sustainability and economic justice initiatives, interviewed Program Directors, and reported results and recommendations for the creation of a new Office of Sustainability. Participated with (shadowed) in-house attorneys in program enforcement meetings with external partners. Conducted outreach to explore prospective collaborations with local universities, and drafted preliminary memoranda of understanding.

Consultant, **CITY OF BOSTON, PUBLIC FACILITIES DEPARTMENT**, Neighborhood Planning & Program Development Division, Boston, MA, 1991 – 1992. Researched, presented

findings and recommended policies for Mayor Raymond Flynn's initiatives on: (1) housing programs for person with HIV/AIDS, and (2) the feasibility of alternative private capitalization source for the municipal housing trust fund.

- "A Report on How Supportive AIDS Housing Projects Are Being Financed and Implemented in Other Metropolitan Areas: Lessons For Boston." July 1992. Neighborhood Planning & Program Development Division, Public Facilities Department, City of Boston.
- "A Report on Alternative Capitalization Sources for Boston's Neighborhood Housing Trust Fund." March 1992. Policy & Program Development Resources, Public Facilities Department, City of Boston.

SELECT BOARD & COMMUNITY SERVICE

Member, Church of God Ministries Council, Anderson, IN. 2017-Present.

Director, Southern Environmental Law Center, Charlottesville, VA. 2012-2014.

Director, Tapestry Development Group, Decatur, GA. 2001-2014.

Volunteer "Baby Buddy" (Neonatal ICU), Children's Healthcare of Atlanta, Atlanta, GA. 2009-2011.

Member, Sustainable Atlanta Initiative Advisory Board, Atlanta, GA. 2007-2011.

Member, Emory University Board of Visitors, Atlanta, GA. 2008-2010.

Member, The Next American City Advisory Board, New York, NY. 2007-2009.

Member, Bank of America National Community Advisory Council, Charlotte, NC. 2005-2009.

Member, Trust for Public Land, National Real Estate Council, San Francisco, CA. 2005-2009.

Director, Association of Black Foundation Executives, New York, NY. 2004-2007.

Member, Freddie Mac Affordable Housing Advisory Council, McLean, VA. 2004-2006.

Director, National Law Center on Homelessness & Poverty, Washington, DC. 2004-2006.

Director, Board of Overseers, Southern New Hampshire University, School of Community Economic Development, Manchester, NH. 2003-2006.

Director, Enterprise Community Loan Fund/EHFS, Columbia, MD. 2001-2006.

Director, Enterprise Community Investment/ESIC, Columbia, MD. 2003-2006.

Member, Fannie Mae Housing Impact Advisory Council, Washington, DC. 2002-2004.

SELECT PRESENTATIONS, LECTURES & PUBLIC SPEAKING

Training, “Bond Financing Transactions,” HUD Region IV, Office of Multifamily Housing and Office of Counsel, Atlanta, GA, September 1, 2021.

Co-Trainer, “Interpreting and Researching Statutes & Regulations (Overview & Practicum),” HUD Region IV, Office of Counsel, September 4, 2020 and October 9, 2020.

Presenter, “Redeeming Justice” blog article during “Law, Religion, and Coronavirus in the United States: A Six-Month Assessment,” a blog webinar co-organized by Emory CSLR and four other Law and Religion programs, October 2, 2020.

Panelist, “Social Activism & the Church,” Virtual Conference sponsored by the National Association of the Church of God, August 3, 2020.

Trainer, “The Rental Assistance Demonstration Program,” HUD Region IV, Office of Multifamily Housing and Office of Counsel, Atlanta, GA, June 19, 2019.

Co-Trainer, “FHA Bond & Low-Income Housing Tax Credit Transactions,” HUD Region IV, Office of Counsel, August 3, 2018.

Presenter, “Smoke-Free Public Housing Final Rule Implementation and Enforcement” and “Updates to the Violence Against Women Act,” 2017 Public Housing Forum, HUD Region IV, Office of Public Housing, Atlanta, GA, July 31, 2017.

Trainer, “Primer: HUD Public and Indian Housing Programs,” HUD Office of General Counsel – Office of Assisted Housing and Community Development, Atlanta, GA, March 28, 2017.

Trainer, “Primer: HUD Community Planning and Development Programs,” HUD Region IV, Office of Counsel, Atlanta, GA, February 27, 2017.

Moderator, “Financial Literacy in Seminaries and Faith-Based Organizations (Panel),” Ninth Annual Financial Literacy Leadership Conference, Society for Financial Education and Professional Development, Inc., Atlanta, GA, October 18, 2016.

Facilitator, “Strategic Planning & Training Retreat: Whose Neighborhood Is It?” Clergy for Community Wealth Preservation, Washington, DC, May 2016.

Trainer, “The Real Estate Development Process for Community Development,” HUD Office of General Counsel – Office of Assisted Housing and Community Development, Washington, DC, May 2016.

Co-Facilitator, Breakout session on “Policy Enforcement” during “The White House Convening on HUD’s Proposed Smoke Free Housing Rule,” The White House Office of Public Engagement & HUD, Washington, DC, January 6, 2016.

Guest Lecturer on “Tax Increment Financing & The BeltLine Tax Allocation District” in “State & Local Government Law” course (Professor Frank S. Alexander), Emory University School of Law, April 2014.

Guest Speaker on “Reflections on Community Building & Social Change,” Community Building/Social Change Fellows Program, Emory College, Atlanta, GA, May 22, 2013.

Guest Lecturer on “Sustainability & Community Development” in the Sustainability Seminar (EH 590R), Rollins School of Public Health, Emory University, September 27, 2011.

Panelist with House Speaker Newt Gingrich and Terry Maple, “Environmental Sustainability/Contract with the Earth,” Atlanta, GA, October 2007.

Keynote Speaker, “Sustainability” Southface, Inc. Greenprints Conference, February 2007.

Keynote Speaker, Urban Marketplace Conference, Urban Land Institute – Atlanta, October 2006.

Congressional Testimony on “Minority Homeownership” before the U.S. House of Representatives, Committee on Financial Services, Washington, D.C., September 2005.

Panelist, White House Conference on Minority Homeownership, The White House and the U.S. Department of Housing and Urban Development, October 2002.

SELECT AWARDS, HONORS & RECOGNITION

McDonald Distinguished Scholar (Non-resident), Center for the Study of Law and Religion, Emory University, Atlanta, GA 30022, 2018-Present.

Leadership Government (Class of 2018), Atlanta Federal Executive Board, 2018.

Legal Honors (Class of 2014-2015), U.S. Department of Housing and Urban Development, 2014-2015.

Eliza Ellison Prize for Leadership in Law and Religion, Center for the Study of Law and Religion (CSLR), Emory University School of Law, 2014.

Herman Dooyeweerd Prize, CSLR, Emory University School of Law, 2014.

Linda L. Savage and Mary Lee Lebey Scholarship Award, CSLR, Emory University School of Law, 2012-2013.

Merit Scholarship, Candler School of Theology, Emory University, 2010-11, 2009-10.

Leadership Atlanta (Class of 2010), Metro Atlanta Chamber of Commerce, 2009-2010.

2009 Regional Leadership Institute, Atlanta Regional Commission, 2009.

“100 Most Influential Atlantans”, Atlanta Business Chronicle, 2008, 2007.

“Who’s Who in Commercial Real Estate: 100 Movers & Shakers That Helped Shape Atlanta” Atlanta Business Chronicle, 2008.

SELECT LICENSES & CERTIFICATIONS

Licensed to practice law in the District of Columbia (D.C. Court of Appeals), September 2016

Licensed to practice law in the State of Georgia (Superior Courts of Georgia), November 2014

Certified Lean/Six Sigma Green Belt, Atlanta Federal Executive Board, September 2018

Certified Career Coach, Paradigm 360 Coaching, September 2018

Certified Mediator, Federal Mediation and Conciliation Service, March 2018; and ADR Atlanta (General Civil Mediation), January 2022

Certificate of Completion, Principles of Appropriations Law, U.S. Government Accountability Office and HUD, August 2015.

REFERENCES

Provided upon request.