

Request for Proposals

CDFI State and Local Housing Advocacy Program

The African American Alliance of CDFI CEOs

Proposal Submission Deadline: March 3, 2025

Letter of Intent to Apply Deadline: February 21, 2025

Contact: Somala Diby, sdiby@aaacdfi.org

Project Overview

The African American Alliance of CDFI CEOs (the Alliance) is piloting a new program aimed at strengthening the ability of members to advocate for policy reforms in their communities that accelerate housing justice. Through structured trainings guided by a curriculum developed by a subject matter expert, this program will provide members with foundational knowledge on housing justice, state and local political processes, bipartisan coalition-building, and the role that Community Development Financial Institutions (CDFIs) can play in influencing housing policy.

In the short term, members will be equipped with tools, skills, and confidence to identify local housing coalitions, craft compelling stories that resonate with stakeholders, and provide strategic support to local housing policy campaigns. In the long term, we hope that members will grow their leadership and influence within state and local housing policy organizing spaces; dedicate resources within their organizations for housing policy analysis and research and political organizing; and achieve anti-racist pro-housing policy wins in their communities.

This program will fulfill one of three goals included in the [Alliance Housing Initiative's Roadmap](#), the Alliance's plan to support its members to increase their impact on housing justice initiatives and build a more equitable housing landscape in the communities they serve. The Roadmap is available for download at www.tinyurl.com/ahiroadmap.

Objectives

1. Deliver a structured, facilitated training that empowers members to influence local housing advocacy ecosystems through bipartisan coalition-building and anti-racist policy change.
2. Deepen members' and the Alliance's understanding of state and local policy ecosystems and how Black-led CDFIs can influence these ecosystems to achieve anti-racist policy change in housing.
3. Prepare members to practice their advocacy skills during advocacy days, public hearings, advisory councils and other policy-making venues.
4. Create the infrastructure for the Alliance to sustain and improve upon this program in the future.

Target Outputs and Outcomes

Project Outputs

- Members build a new relationship with at least 1 local, state, and/or federal elected official
- Members gain a comprehensive understanding of the political networks that shape housing justice in their markets
- Members can clearly articulate a definition of housing justice as well as the role of their organization in advancing housing justice
- Through the program, the Alliance publishes guides and materials that are useful to the full membership
- The Alliance obtains member stories that illustrate the impact of this program
- The Alliance learns more about member capacity — specifically their ability to engage politically—and tangible ways that it can help members build this capacity

Short-term Outcomes

- Members gain confidence to prepare for and execute productive conversations with elected officials, demonstrated through their ability to craft practical asks that align with state and local housing, community, and economic development priorities; and to generate compelling communications materials
- The Alliance develops new forms of collaboration with members to advance its policy and advocacy priorities

Long-term outcomes

- Members influence state and local housing justice policy in their communities. This could be evidenced by:
 - Membership in local and/or state housing coalitions
 - Direct participation in policy campaigns
 - Testifying to elected officials on budgets or legislation
 - Building relationships with unconventional allies
- The Alliance expands the network of allies and elected officials at the local, state and federal levels that are aware of CDFIs as well as the needs and contributions of Black-led CDFIs

Scope of Work

Overview

Over the course of this engagement, the Consultant will deliver the following deliverables, outlined in more detail below:

Deliverable	Audience
<p>1. Curriculum Design and Delivery. A virtual training curriculum that will provide foundational knowledge on housing justice, state and local political processes, and the role that CDFIs can play in influencing housing policy. The Consultant will both design and deliver this curriculum.</p>	<p>Full Alliance membership (100+ CEOs)</p>
<p>2. Participant Recruitment. An application for Alliance members to apply to join the program cohort and a summary of applications and participant recommendations.</p>	<p>Cohort participants only</p>
<p>3. Local Housing Ecosystem Reports. Customized 3- 5 page reports for each participant that quantify housing inequities as well as an overview of policy and political landscape within each participants' market.</p>	<p>Cohort participants only</p>
<p>4. Participant Coaching. The Consultant will offer time outside of structured training sessions to support cohort participants with program deliverables and preparation for targeted advocacy activities.</p>	<p>Cohort participants only</p>
<p>5. Advocacy Toolkit for Full Membership. The Consultant will develop a 5-10 page housing justice advocacy toolkit for CDFIs to be made available to all Alliance members, including those who are not taking part in the cohort.</p>	<p>Full Alliance membership (100+ CEOs)</p>
<p>6. Strategic and Programmatic Recommendations for the Alliance. The Consultant will generate recommendations to the Alliance to improve design and implementation of this program in the future.</p>	<p>The Alliance</p>

1. Curriculum Design and Delivery

With Alliance guidance, the Consultant will lead the development of a structured curriculum to guide participant training through the program. The Consultant will also lead in the delivery and facilitation of the curriculum. Content and format should include the following at a minimum:

Content ***see Appendix below for an example curriculum***

- **The curriculum will minimally enable participants to explore and develop substantive responses to the following questions:**
 - What is housing justice? What is anti-racist policy change? What is CDFI's responsibility for taking part in movements for housing justice?
 - What needs to change in your community?
 - What is advocacy? What does advocacy look like to a CDFI? How does a CDFI become an effective advocate?
 - What level of investment of time and resources is necessary to be effective?
 - How can CDFIs effectively navigate across political differences to pursue housing justice?
- **The curriculum should also enable participants to build confidence in the following areas:**
 - Articulating what housing justice means to a CDFI
 - Navigating local and state political systems and processes
 - Housing justice policy levers at the state and local levels
 - Bipartisan stakeholder engagement and coalition-building
 - Policy analysis
 - Data-driven storytelling
 - Crafting a compelling ask
 - Facilitating effective 1:1 conversations
- **Curriculum materials will minimally include:**
 - Slide decks
 - Facilitator guides
 - Participant worksheets and exercises
 - Proposed guest speakers with recruitment plan
 - Assessment frameworks, including pre and post surveys

Format

- Curriculum should include no more than 6 synchronous virtual training sessions. If you propose more sessions, please provide a rationale
- Curriculum should provide a range of pedagogical approaches and techniques to appeal to various learning styles
- Curriculum should feature case studies of housing justice advocacy efforts at the state and local levels, especially those in rural areas and states with conservative legislatures. If

possible, case studies should also highlight the roles that CDFIs play in these efforts.

- Inclusion of guest speakers, especially those who are current Alliance members, is highly encouraged
- No more than 1 hour of pre-reading materials should be included for each session
- Curriculum should be highly interactive and participatory, encourage peer learning and exchange, and allow ample time for members to work through questions
- Curriculum should be practice-oriented and provide participants with skills and materials that they can readily apply to their day-to-day realities

Alliance Role

- Provide Consultant background information on the Alliance and its members as necessary
- Advise Consultant on curriculum design through periodic updates
- Provide final approval on final form of curriculum
- ***Note: The Consultant should be open to co-ownership of program materials between Consultant and the Alliance.***

2. Participant Recruitment and Assessment

The Consultant will support the Alliance in recruiting 5 - 10 members to participate in the cohort program. Key Consultant activities include:

- Lead in the design of an application for interested participants
- Co-facilitate virtual information sessions
- Lead in the review and scoring of applications and generate a summary with recommendations for the Alliance
- Lead in the design of pre- and post-program participant assessments in alignment with state program outputs and outcomes

Alliance role

- Review and provide final approval of the application form
- Distribute application form to membership
- Coordinate virtual information sessions
- Develop member recruitment materials, such as a program one-pager, to distribute to members
- Work with Consultant to review, score, and make final selection of cohort members; final decisions will rest with the Alliance
- Design and distribute participant agreement form to cohort members

3. Local Housing Ecosystem Reports

The Consultant will develop customized 3- 5 page reports for each participant that quantify housing inequities and survey the policy and political landscape within each congressional district or state. At a minimum, reports should include:

- A quantification of housing inequities within each participant’s market. This may include:
 - Misalignment between demand and provision of affordable housing
 - Racial disparities in housing outcomes for renters and homeowners
 - Trends in housing price inflation
- Overview of key actors at the state and local levels that influence housing policy, including:
 - Local, state, and federal agencies, boards, and commissions and their roles in managing local housing ecosystems
 - State and local legislatures, highlighting key committees that influence housing policy, potential allies on those committees, and annual timing of relevant legislative cycles
 - Active housing coalitions and campaigns
 - State and local CDFI coalitions
 - Market actors (e.g. local landlord coalitions and commercial real estate groups)
- Overview of recent history of housing justice wins and challenges
 - Composition of state and local legislatures in the present day and how they have evolved within the last 5 – 10 years. This could highlight preemption laws, conservative policy hurdles, and other unique features of the policy landscape.
 - Recent housing policy wins and the key actors who shaped those wins
 - Top 2 – 4 elected officials that are well-positioned to support CDFIs interested in advocating for housing justice
- Initial recommendations for anti-racist policy change that members could pursue in their communities

Recommendations should be politically feasible and grounded in the analysis of political landscape established through this report.

4. Participant Coaching

Throughout the program, the Consultant will offer members opportunities to workshop training content directly with the Consultant outside of structured trainings (e.g. office hours). The Consultant can use this time to support members with completing program deliverables and supporting advocacy activities beyond the program. We defer to the Consultant on format, although it should be clearly outlined in the proposed curriculum structure.

5. Advocacy Toolkit for Full Membership

Using the curriculum as a guide, the Consultant will develop a truncated 5-10 page housing justice advocacy toolkit for CDFIs to be made available to all Alliance members. The Alliance will publish this toolkit publicly and circulate to all members. At a minimum, the toolkit should provide:

- An overview of the key advocacy tactics and strategies for CDFIs advancing housing justice through anti-racist policy change
- 1 case study of a state or local housing policy success that illustrates these tactics and strategies in practice
- Templates for one-pagers, phone scripts, sample meeting agendas, and other materials that members can customize to deploy in their own advocacy efforts
- A list of books, articles, toolkits, and other resources that can support members

6. Strategic and Programmatic Recommendations for the Alliance

The Consultant will generate recommendations to the Alliance to improve program design and implementation and to advise on how the Alliance can best support state and local advocacy work. Key activities will include:

- Discuss with Alliance team members the organizational infrastructure necessary to sustain the program
- Develop of recommendations for program design
- Create a template/system for the Alliance to track cohort members progress towards short-, med-, and long-term outcomes
- Review of recommendations with Alliance team members

How We Hope to Work Together

To support smooth collaboration between the Alliance and the Consultant, we expect the following level and types of communication throughout the project:

- **Work plan.** At the start of the engagement, the Consultant should create a work plan that includes all scope items and aligns with the Alliance’s target timelines
- **Biweekly check-in calls,** whereby Consultant prepares meeting agendas and takes meeting minutes. The call schedule can be revisited as the program evolves
- **Biweekly email progress updates** (sent during alternating weeks from the biweekly calls)

Target Timeline

February 10, 2025	RFP Release
February 21, 2025	Deadline for respondents to send a Letter of Intent to apply
March 3, 2025	Deadline to provide a proposal
By March 21, 2025	Alliance issues final decision on Consultant and notifies all applicants
Week of March 24, 2025	Execute consultant agreement and project kick-off meeting
March 31 – May 9, 2025	Consultant designs curriculum and recruitment materials while Alliance leads recruitment activities
May 12, 2025	Cohort application launch
Week of May 19, 2025	Info session to Alliance members
May 23, 2025	Deadline for cohort applicants
Week of May 26, 2025	Consultant reviews applications with Alliance support and generates summary with recommendations for selections
Week of June 2, 2025	Alliance notifies final participants and issues participant agreements
June 9, 2025 – July 25, 2025	Consultant leads weekly training sessions, prepares local ecosystem reports for cohort participants; and offers participant coaching
July 28, 2025 – August 8, 2025	Consultant draft advocacy toolkit, and generates strategic recommendations for the Alliance
Month of August	Alliance shares feedback on final deliverables; consultant finalizes
August 31, 2025	Project close-out

What We're Looking For

We are aware that this project demands several types of expertise that a single firm may not possess. The Alliance may opt to hire multiple consultants to manage separate and discrete parts of the scope. Overall, we encourage respondents to get creative in their staffing approach to meet the project's needs.

The ideal consultant will have demonstrated expertise and experience with:

- Developing and delivering curricula to professional audiences, and ideally audiences of community development nonprofits and organizations
- State and local housing ecosystems and political dynamics, and especially experience with bipartisan coalition-building
- Advocacy and community organizing, especially within the housing space
- CDFIs and the role they play in local housing ecosystems
- Anti-racism and housing justice

The ideal Consultant will also have:

- A minimum of ten years of experience in one or more (combined) in the disciplines listed above
- Experience working with non-profit lenders
- Alignment with the Alliance's mission and core values
- Demonstrated business and technology acumen
- Strong written and verbal communication skills
- An understanding and experience solving real business problems
- Proven track record of delivering results
- Experience working with and/or leading a team
- Ability to work across industries, roles, functions & technologies

Evaluation Metrics and Criteria

- Technical expertise
- Previous experience/past performance history
- Samples and/or case studies from previous projects
- Projected costs
- Familiarity with and experience working within the CDFI industry, with non-profit lenders, or similar projects and
- Responsiveness to the proposal format described below

Current Roadblocks and Barriers to Success

- This is a virtual project with no in-person engagement required
- Participating organizations are in various geographical regions with varying political contexts. They also vary in attributes such as asset size, staff size, and internal capacity.
- Housing justice policy measures may be less palatable in markets with shifting local, state, and federal political regimes.

Proposal Format

In no more than **8 pages**, please provide the following

1. **Executive Summary:** Briefly outline your understanding of the project and how your firm is uniquely qualified to deliver on the scope of work.
2. **Company Overview:** Provide a brief overview of your firm, including key personnel, relevant experience, and any distinguishing qualities.
3. **Approach and Methodology:** Describe your approach to managing and executing the project, including any specific methodologies, tools, or techniques you will employ.
 - a. **Curriculum approach.** Include your proposed approach to curriculum design that highlights:
 - i. Overall curriculum structure and pedagogical approach
 - ii. Key learning objectives for each component/session of the curriculum and how they connect to the Alliance's general project goals, objectives and outcomes
 - iii. Clear identification of the skills, tools, and materials that participants will walk away with at the end of the program
4. **Project Team:** List the key members of your project team, their roles, and relevant experience.
5. **Timeline:** Provide a detailed timeline for project execution, including major milestones and deliverables.
6. **Cost Proposal:** Submit a detailed cost breakdown for the project, including any assumptions or exclusions.
7. **References:** Include at least 2 references from similar projects.
8. **Work samples [Optional].** Feel free to share no more than 2 samples of previous related work.

Proposal Submission

Please submit your Letter of Intent to apply by **February 21, 2025** and your full proposals by **March 3, 2025**. Please send all materials and questions to Somala Diby, Sr. Program Director, at sdiby@aaacdfi.org.

Appendix. Example curriculum structure

Session	Guiding Questions	Content	Cohort Participants Deliverables
1	<p>Why are we here?</p> <p>What is housing justice?</p> <p>What is anti-racist policy change?</p> <p>What is CDFI's responsibility for taking part in movements for housing justice?</p>	<p>Primer on housing justice, with a focus on local and state legislative and budget processes, and the role of CDFIs in shaping political process towards housing justice</p> <p>Role historically and currently that CDFIs play in shaping housing policy at the federal, state, and local levels and the corresponding impact</p> <p>Why it's important that Black-led CDFIs are in the housing justice space</p> <p>Present case studies of how CDFI advocacy shapes bottom lines for organizations and supports organizational sustainability, perhaps with guest speakers</p>	<p>Develop 1-3 sentence statement that articulates why it's important to members to participate in local policymaking efforts (i.e. story of self, story of us, story of now)</p>
2	<p>What needs to change in your community?</p>	<p>Policy analysis; data analysis; quantifying inequities</p> <p>How to find housing-related legislation and appropriations</p> <p>Overview of housing justice policymaking and examples of successful housing justice policy wins at the state and local levels</p>	<p>Analysis of at least one local housing policy that members who like to pursue or transform</p>
3	<p>What is advocacy?</p> <p>What is organizing?</p> <p>What does advocacy and organizing look like for a CDFI?</p>	<p>Overview of advocacy strategy and tactics and how CDFIs can develop and leverage strategy and tactics</p> <p>Example topics</p> <ul style="list-style-type: none"> Relationship building and how to have an effective 1:1 conversation with prospective allies Building effective teams 	<p>Power map that identifies key housing actors in member ecosystems and local housing policy efforts they can take part in</p> <p>Have a 1:1 conversation with at least 1 other CDFI in your market about the housing justice policy</p>

		<ul style="list-style-type: none"> • Power with vs. power over • Power-mapping: your CDFI board, your constituency, and your elected officials • Distributed leadership • Theories of change • Campaign building 	AND/OR join your local CDFI Coalition
4	How does a CDFI become an effective advocate?	Data, storytelling, public narrative, refining your “ask,” refining your message for different audiences	<p>Revisit and refine the 1-3 sentence statement that articulates why it’s important to members to participate in local policymaking efforts.</p> <p>Develop a compelling one-pager on your CDFI that supports a specific policy ask</p> <p>Develop a list of 5-7 of your clients with whom you can develop compelling impact stories to be shared with state/local decision-makers</p>
5	Putting it all together: Planning an Advocacy Day	Members develop framework for an Advocacy Day in their community. This is an opportunity for members to practice the skills they’ve built through the program.	Members draft an Advocacy Day packet
6	Celebration, Reflection and Close-out	Members reflect on their learnings from the cohort and define concrete next steps for their state and local advocacy work beyond the cohort	Identify 3 concrete steps participants intend to make to advance housing justice in their state and local communities