

Request for Proposals

CDFI State and Local Housing Advocacy Program

The African American Alliance of CDFI CEOs

Proposal Submission Deadline: June 1, 2026

Letter of Intent to Apply Deadline: May 26, 2026

Contact: Nuccalie Cherident, ncherident@aaacdfi.org

Project Overview

The **African American Alliance of CDFI CEOs (the Alliance)** seeks proposals from qualified consultants or firms to support **Housing Justice Champions 2.0 (HJC 2.0)**, an implementation-focused initiative advancing state and local housing policy campaigns led by Black-led CDFIs.

From September to December 2025, Housing Justice Champions 1.0 convened a cohort of 10 Black-led CDFIs that are members of the Alliance, and built foundational advocacy knowledge, skills, and campaign plans through curriculum-based trainings and organizational coaching.

HJC 2.0 will encourage 2-3 member organizations to move from **planning and education to measurable progress in executing state and local housing policy campaigns**.

Unlike Cohort 1, this program will not provide general advocacy training. Instead, it will deliver **deep, customized implementation support** to a small group of organizations positioned to advance active housing justice campaigns.

HJC 2.0 is intentionally designed as a **high-touch engagement**, concentrating resources on fewer organizations that demonstrate readiness to execute advocacy strategies within defined political windows. The program prioritizes achieving tangible campaign milestones while strengthening each organization's long-term capacity to sustain policy advocacy beyond the engagement period. Through this work, the Alliance also aims to establish a scalable model for supporting and tracking Black CDFI-led housing advocacy nationwide.

The selected consultant(s) will partner with the Alliance to help participating organizations achieve defined campaign milestones, strengthen internal advocacy capacity, and increase influence within state and local housing ecosystems.

To learn more about Housing Justice Champions, see [the RFP for HJC 1.0](#) and [a recent blog post summarizing early learnings from the cohort](#).

Member Profiles & Defined Priorities

Housing Justice Champions 2.0 is informed directly by participating Alliance members who have identified housing policy focus areas and the types of implementation support required to advance active campaigns. The selected cohort reflects variation in geography, organizational scale, and priorities while demonstrating shared demand for sustained advocacy infrastructure.

Please review the full organizational [Member Scope and Advocacy Profiles](#). Consultant responses should be responsive to and reflective of the organizational contexts described in these profiles.

Overview of Member Policy Advocacy Priorities

Organization 1 - Greenville, South Carolina

Profile: Serving the state of SC; \$10M - \$30M in assets; 17 years in operation

Policy Issue Areas of Interest:

- Affordable housing production policies
- Housing trust funds or dedicated funding streams
- Homeownership access and affordability

Consultant Support Need:

- Developing organization-wide advocacy strategy
- Housing policy data collection, research, and analysis
- Dedicated support strengthening internal advocacy capacity

Organization 2 - Phoenix, Arizona

Profile: Serving the State of AZ; < \$10M in assets; 13 years in operation

Policy Issue Areas of Interest:

- Affordable housing production policies
- Preservation of affordable housing
- State or local housing finance policy

Consultant Support Need:

- Fundraising strategy for advocacy
- Dedicated support strengthening internal advocacy capacity
- Access to peer networks, national coalitions, or best practices

Organization 3 - Chicago, Illinois

Profile: Serving Chicago, IL; \$10M - \$30M in assets; over 50 years in operation.

Policy Issue Areas of Interest:

- Anti-displacement policy initiatives

- Preservation of affordable housing
- Heirs property policy reform

Consultant Support Need:

- Coalition management and partnership building
- Technical assistance and mentorship
- Housing policy data collection, research, and analysis

How Members Built Capacity in Cohort 1

During Housing Justice Champions 1.0, each member completed two major deliverables for their organizations. These deliverables reflect the foundational policy advocacy capacity cultivated by members during Cohort 1:

Local Housing Ecosystem Analysis

Each organization analyzed their local housing landscape and identified the strongest opportunities for housing justice advocacy, through the following exercises:

- **Local housing conditions analysis**, including homeownership gaps, rental affordability, eviction trends, housing prices, investor activity, displacement risks, and other key community data.
- **Policy power mapping**, identifying which state, county, or city actors control housing decisions, legislative timelines, and viable pathways for policy change.
- **Review of the current policy environment**, assessing existing housing policies, recent policy changes, and gaps where new reforms are needed.
- **Federal–local housing connections**, examining how federal housing programs and policy shifts impact local communities and advocacy opportunities.
- **Organizational advocacy assets**, documenting unique data, relationships, credibility, and strategic roles organizations can play in campaigns.
- **Opportunity prioritization**, using a scoring framework to select the most feasible and high-impact housing advocacy campaign focus.

Campaign Plan

Organizations translated opportunities and priorities identified through the Local Housing Ecosystem Analysis into structured, implementation-ready advocacy campaign plans. Each plan includes:

- **Campaign goal and objectives development**, defining clear outcomes and focus areas.
- **Housing and political landscape analysis**, grounding the campaign in local housing data, decision-making structures, key targets, vote thresholds, timelines, and barriers.
- **Target and power analysis**, identifying decision-makers, influencers, opposition actors, and strategic approaches for moving policy.
- **Campaign strategy and tactics**, outlining the theory of change, advocacy activities, and policy timeline aligned with upcoming decision windows.
- **Coalition and messaging strategy**, identifying partners, allies to cultivate, and tailored messaging for decision-makers, media, and community audiences.
- **Implementation planning**, including campaign phases, milestones, success metrics, staffing roles, resource needs, funding alignment, and internal decision-making structures.

Objectives & Deliverables

Objective 1: Advance Active Housing Policy Campaigns

Provide intensive implementation support to a select group of Alliance members prepared to advance existing housing justice campaigns at the state or local level.

Target

- Onboard 2-3 organizations
- Each organization establishes a defined implementation scope and milestone plan within the first 30 days

Required Deliverables

Deliverable 1. Campaign Implementation Package (*Consultant Leads*)

- Organizational Campaign Assessment
- Campaign Implementation Workplans

Deliverable 1a. Campaign Execution Support & Adaptive Management (*Consultant Leads; Participants Implement*)

- Engagement roadmap tied to project activities
- Advocacy tracking framework, documenting campaign progress and adjustments

Potential Additional Deliverables (Project-Dependent)

- Regulatory advocacy strategy
- Administrative policy engagement strategy
- Coalition engagement or partnership strategy

Objective 2: Drive Measurable Campaign Progress

Support participating Alliance members in achieving concrete advocacy milestones tied to their campaign strategies.

Target

- Each organization completes at least 2–3 campaign milestones, such as:
 - Introduction or advancement of policy proposals or administrative actions
 - Securing policymaker commitments or sponsorship
 - Launching coordinated advocacy campaigns
 - Establishing or strengthening coalitions
 - Progress toward funding, regulatory, or institutional outcomes

Required Deliverables

Deliverable 2. Milestone Advancement Support Package (*Consultant Lead; Participants Execute*)

- Personalized coaching sessions, supported with summaries documenting support provided

- Campaign implementation coaching sessions, supported with summaries documenting support provided
- Advocacy strategy memo (as needed)
- Stakeholder & power map
- Communications/narrative strategy
- Advocacy materials supporting milestone advancement (e.g., policy research, briefing materials, or fact sheets)

Objective 3: Build Sustainable Internal Advocacy Capacity

Strengthen organizational capacity of Alliance members to lead housing policy advocacy beyond the cohort period.

Target

- Participating organizations demonstrate increased internal readiness for ongoing advocacy engagement

Required Deliverables

Deliverable 3. Organizational Advocacy Capacity Plan (*Consultant Lead; Participants Adopt*)

- Create internal advocacy infrastructure plan
- Advocacy capacity coaching among all participants
- Leadership strategy sessions focusing on alignment of policy priorities and organizational buy-in

Potential Additional Deliverables

- Staff advocacy training tools
- Governance or decision-making frameworks
- Advocacy integration into organizational planning

Objective 4: Operationalize Advocacy Tracking and Learning

Operationalize program monitoring to track campaign implementation, assess progress toward milestones, and support adaptive decision-making throughout the cohort.

Target

- Advocacy tracking system actively used across all participating organizations
- Monthly reporting completed by each organization
- Alliance staff equipped to support members tracking post-program

Required Deliverables

Deliverable 4. Advocacy Tracking & Reporting System (*Consultant Design; Alliance Owns; Participants Use*)

- Monthly progress reporting system
- Milestone Evidence Log
- Barrier & Adjustment Briefs

- Participation & engagement tracker

Objective 5: Capture and Share Field Learning

Document lessons and early outcomes to strengthen Alliance learning and field leadership.

Target

- Produce at least one synthesis or learning product
- Present lessons learned through at least one external sharing opportunity, when feasible

Required Deliverables

Deliverable 5. Cohort Learning & Knowledge Products (*Consultant Lead; Alliance Disseminates*)

- Post-program action plans for each organization
- One cross-cohort synthesis (of no more than 8-10 pages)
 - This should include recommendations to the Alliance for continuation, scaling housing advocacy work
- One public-facing product per organization (e.g., fact sheet, 1-pager, slides, case study)

Please refer to the Consultant Scope of Work & Accountability section for additional breakdown of the objectives and expectations.

Desired Outcomes

Short-Term Outcomes

When program objectives are met, Housing Justice Champions 2.0 will result in these near-term achievements within and immediately following the program period:

1. Substantial Campaign Advancement

Participating organizations demonstrate measurable short-term progress toward housing justice policy goals, evidenced by milestone completion and increased advocacy engagement.

Indicators

- Increase in number of advocacy or campaign activities initiated or supported compared to baseline
- Increase in coalition meetings attended and new relationship forged by participating organizations
- Advocacy campaigns refined and executed
- Organizational milestones completed toward longer-term policy goals

2. Increased Organizational Advocacy Capacity

CDFIs solidify foundational capacity internally to consistently engage in advocacy within a six-month period.

Indicators

- Increased confidence of organizational leaders and staff to engage in advocacy
- Assign staff or create working groups to support advocacy efforts

3. Alliance Institutional Learning and Replication

The Alliance develops a replicable model for supporting and measuring CDFI-led housing advocacy.

Indicators

- Operational advocacy tracking system
- Documented program lessons and challenges
- Development of materials supporting replication or future scaling
- At least one publication summarizing HJC 2.0 and its accomplishments

Long-Term Outcomes

While influenced by HJC 2.0, the following outcomes extend beyond the program timeframe.

1. Expand Visibility and Influence of Black-Led CDFIs

Participating organizations increase their presence and participation within local and state housing policy and advocacy ecosystems.

Indicators

- Continued participation in local or state housing coalitions
- Contributions to joint advocacy statements, campaigns, or public comments
- Growth in collaborative relationships with advocacy partner

2. Sustained Organizational Commitment to Advocacy

Organizations maintain housing advocacy engagement beyond the program period.

Indicators

- Advocacy embedded within organizational strategic priorities
- Continued allocation of staff time or institutional resources toward policy engagement

3. Strengthened Cross-Sector Housing Ecosystems

Relationships formed through HJC 2.0 contribute to more coordinated local housing systems.

Indicators

- Durable partnerships between CDFIs, advocacy organizations, and public agencies
- CDFIs serving as ongoing collaborators or conveners within housing coalitions
- Evidence of sustained collaboration advancing shared housing goals

4. Field Influence and Replication Across the Alliance Network

Learning generated through HJC 2.0 informs broader Alliance strategy and peer adoption.

Indicators

- Program approaches incorporated into future Alliance initiatives
- Replication or adaptation of advocacy practices by additional Alliance members
- Use of HJC lessons to inform national housing justice conversations or strategies

Consultant Scope of Work & Accountability

This framework, **which is subject to change**, establishes required deliverables, performance expectations, audiences, and timelines for Housing Justice Champions 2.0. It serves as:

- Consultant scope of work & implementation checklist
- Progress monitoring tool & periodic performance review guide

PHASE 1 — Program Launch & Campaign Alignment *(Objective 1: Advance Active Housing Policy Campaigns)*

Task	Key Activities	Description	Primary Audience	Responsible Party	Deadline	Evidence of Completion	Alliance Check-In Use
Deliverable 1. Campaign Implementation Package							
Establish implementation foundation	Organizational Campaign Assessment	Review campaign plan, political context, capacity, and risks for each organization, using materials provided by members and the Alliance.	Participating Orgs + Alliance	Consultant (Lead) + Participants provide inputs	Within 30 days of launch	Written assessment + briefing	Confirm readiness & baseline
Define measurable outcomes	Campaign Implementation Workplan	Identify 2–3 campaign milestones, activities, timeline, and success indicators	Participating Orgs + Alliance	Consultant + Participants (Lead & Validate)	Within 30 days	Approved workplan	Validate milestone clarity
Deliverable 1a. Campaign Execution Support & Adaptive Management							
Align expectations	Engagement Roadmap	Meeting cadence, communication structure, reporting expectations	Alliance	Consultant (Draft) + Alliance (Approve)	Within 30 days	Engagement plan submitted	Ensure accountability structure
Establish tracking system	Advocacy Tracking Framework	Design system for tracking campaign activities, milestones, adjustments and outputs	Alliance	Consultant (Design & Launch) + Alliance (Owner)	Within 45-60 days	Tracker live and shared	Verify monitoring capacity

PHASE 2 — Campaign Implementation Support (Objective 2: Drive Measurable Advocacy Progress)

Task	Key Activities	Description	Primary Audience	Responsible Party	Deadline	Evidence of Completion	Alliance Check-In Use
Deliverable 2. Milestone Advancement Support Package							
Advance policy campaigns	Campaign Implementation Coaching Sessions	1:1 implementation coaching focused on execution, decision-making, and strategy troubleshooting	Participating Orgs	Consultant (Lead); Participants implement actions	Minimum monthly	Coaching logs	Review engagement quality
Strengthen project strategy	Advocacy Strategy Memo (As needed)	Action-oriented strategy tied to organization’s specific advocacy approach	Participating Orgs	Consultant	As needed (early phase)	Memo + implementation actions	Confirm actionable strategy
Improve strategic positioning	Stakeholder & Power Map	Identify decision-makers, allies, opposition, and leverage points relevant to established goals	Participating Orgs + Alliance	Consultant (Develop, Validate & Strategize action plan) + Participants	By Month 2	Power map submitted	Assess readiness
Support coalition leadership	Coalition Engagement Plan (Project-Dependent)	Strategy to build or strengthen partnerships	Participating Org	Consultant (Guide); Participants lead outreach	By Month 3	Plan + coalition activity evidence	Evaluate field influence
Strengthen advocacy narrative	Communications/Narrative Strategy	Messaging framework supporting campaign goals	Participating Org	Consultant (Develop); Participants deploy	By Month 3	Messaging materials	Track public positioning
Enable advocacy execution	Advocacy Materials	Briefs, talking points, policy summaries, testimony prep	Policymakers / Stakeholders	Consultant (Support w/ preparation);	Ongoing	Materials produced & used	Confirm real advocacy activity

				Participants use in advocacy			
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PHASE 3 — Organizational Capacity Building *(Objective 3: Build Sustainable Internal Advocacy Capacity)*

Task	Key Activities	Description	Primary Audience	Responsible Party	Deadline	Evidence of Completion	Alliance Check-In Use
Deliverable 3. Organizational Advocacy Capacity Plan							
Build internal advocacy systems	Internal Advocacy Infrastructure Plan	Defined advocacy roles, decision processes, and workflows to support short to long-term engagement	Participating Org Leadership	Consultant (Lead, Facilitate & Draft) + Participants adopt	Month 4	Plan adopted internally	Measure sustainability
Increase staff engagement	Advocacy Capacity Coaching	Support integrating advocacy across staff roles	Participating Org	Consultant	Ongoing	Participation documentation	Assess organizational growth
Institutionalize advocacy	Leadership Strategy Session	Executive leadership alignment on advocacy priorities and sustainability	Participating Org Leadership	Consultant (Facilitate) + Alliance observe/support	Month 4-5	Session summary	Confirm executive buy-in

PHASE 4 — Tracking, Reporting & Accountability (Objective 4: Operationalize Advocacy Tracking & Learning)

Task	Key Activities	Description	Primary Audience	Responsible Party	Frequency	Evidence of Completion	Alliance Check-In Use
Deliverable 4. Advocacy Tracking & Reporting System							
Monitor campaign progress	Monthly Progress Reports (Process)	Document meetings held, activities completed, barriers, next steps	Alliance	Participants (Submit) + Consultant (Review, Synthesize & Advise) + Alliance (Monitor)	Monthly	Submitted reports	Core monitoring tool
Demonstrate measurable results	Milestone Evidence Log (Outcomes)	Documentation of advocacy actions completed, coalition engagement activity, policymaker engagement and campaign outputs and outcomes	Alliance	Participants (Provide evidence) + Consultant (Review & Advise) + Alliance (Monitor)	Ongoing	Evidence archive	Validate outcomes
Enable adaptive strategy	Barrier & Adjustment Briefs	Identify risks, political shifts, or organizational barriers and recommend course corrections	Alliance	Consultant	As needed	Written updates	Strategic decision support
Maintain engagement quality	Participation Tracking	Track org attendance, responsiveness, and engagement	Alliance	Consultant + Alliance (when necessary)	Monthly	Engagement tracker	Flag risks early

PHASE 5 — Learning, Impact & Closeout *(Objective 5: Capture and Share Field Learning)*

Task	Deliverable	Description	Primary Audience	Responsible Party	Deadline	Evidence of Completion	Alliance Check-In Use
Deliverable 5. Cohort Learning & Knowledge Products							
Transition sustainability	Post-Program Action Plan	Next 12-month advocacy roadmap supporting continued engagement post-cohort	Participating Orgs + Alliance	Consultant (Develop) + Participants contribute & finalize together	Final Month	Transition plan	Program evaluation
Capture field learning	Cohort Synthesis Brief	Publication of 8-10 pages documenting lessons learned, milestones achieved, emerging practices and implementation throughout the cohort, results, and strategic next steps/recommendations for Alliance continuation or scale	Alliance + Field	Consultant (Author) + Alliance (Publish)	Final Month	Published brief (Final report)	Ensure continuation and viability to scale housing policy work
Support external visibility	One Knowledge-Sharing Product	Product can include a fact sheet, case study, slides, or similar, highlighting their advocacy progress	Alliance + External Stakeholders	Participants (Develop) w/ Consultant guidance + Alliance (Disseminate)	Program Close	Event materials	Visibility metric

Ideal Consultant Qualifications

We recognize that this project requires a range of specialized expertise that a single firm may not possess. The Alliance may opt to hire multiple consultants to manage distinct components of the scope of work.

Respondents are encouraged to propose creative staffing approaches that collectively meet the program's implementation needs. While collaborative approaches are welcomed, preference may be given to firms demonstrating the capacity to provide coordinated support across multiple organizations and geographic contexts.

Total Project Budget: \$90,000

This budget is intended to support all consulting services across campaign implementation, capacity building, tracking systems, and learning products. Proposals should reflect efficient staffing models that align deliverables within this budget.

The ideal consultant will have demonstrated expertise and experience with:

- Providing implementation support for policy or advocacy initiatives, 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

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
- Proven track record of delivering results
- Experience working with and/or leading a team
- Ability to work across industries, roles, functions & technologies

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 & Requirements

In no more than **10-12 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 Scope of Work, including any specific methodologies, tools, or techniques you will employ.
 - a. Highlight your approach to working with resource-strapped nonprofits on policy advocacy and organizational capacity.
 - b. Please also highlight your distinct approach to working with each organization. This should reflect an understanding of each organization's context, as summarized in the Member Scope and Advocacy Profiles.
4. **Project Team:** List the key members of your project team, their roles, relevant experience and how much time each team member is expected to contribute to the project.
5. **Timeline:** Confirm execution of the proposed timeline for project execution, including major milestones and deliverables.
6. **Cost Proposal:** Submit a detailed cost breakdown for the project using the template below, including any assumptions or exclusions. ***Submissions that do not use the budget template provided below will not be considered. If minor adjustments need to be made to the template, please include a short budget narrative to explain.***
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.

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
- Ability to service the needs and projects of multiple organizations simultaneously
- Responsiveness to the proposal format described above

Target Timeline

May 26	RFP Release
May 18	Deadline for respondents to submit a Letter of Intent to apply
June 1	Deadline to provide a proposal
June 24	Alliance issues final decision on Consultant and notifies all applicants
July 8	Execute consultant agreement and project kick-off meeting Consultant leads weekly training sessions (excluding Alliance closure periods), prepares local ecosystem reports for cohort participants, and offers participant coaching
July 20, 2026 – February 10, 2027	
December 21-January 1	Alliance office close. Training pauses.
January 4-8	Alliance staff retreat. Training pauses.
January 25	Consultant draft advocacy roadmap, and generate strategic recommendations for the Alliance
February 3	Alliance shares feedback on final deliverables; consultant finalizes
February 10	Project close-out

Proposal Submission

Please submit your Letter of Intent to apply by **May 26, 2026** and your full proposals by **June 1, 2026**. Please send all materials and questions to Nuccalie Cherident, Policy & Research Director, at ncherident@aaacdfi.org.

Budget Template

Project Period: July 20, 2026 – February 10, 2027 (Tentative)

Total Available Budget: \$90,000

Payment Structure: Completion schedule based on deliverable outline in the SOW

Payment	SOW Phase	Deliverables Included	Timeline	Proposed Cost (\$)
Payment 1	PHASE 1 - Program Launch & Campaign Alignment (Objective 1)	Deliverable 1: <i>Campaign Implementation Package</i> <ul style="list-style-type: none"> Organizational Campaign Assessments Campaign Implementation Workplan Deliverable 1a : <ul style="list-style-type: none"> Engagement Roadmap Advocacy Tracking Framework launched 	July – August 2026	
Payment 2	PHASE 2 - Campaign Implementation Support (Objective 2)	Deliverable 2: Milestone Advancement Support Package <ul style="list-style-type: none"> Monthly coaching sessions Strategy memos (as needed) Stakeholder & Power Map Coalition Engagement Plan Advocacy materials supporting milestones 	September – November 2026	
Payment 3	PHASE 3 - Organizational Capacity Building (Objective 3)	Deliverable 3: Organizational Advocacy Capacity Plan <ul style="list-style-type: none"> Internal advocacy infrastructure plans Advocacy capacity coaching Leadership strategy sessions 	November – December 2026	
Payment 4	PHASE 4 - Tracking, Reporting & Accountability (Objective 4)	Deliverable 4: Advocacy Tracking & Reporting System <ul style="list-style-type: none"> Monthly reporting system operational Milestone Evidence Log Barrier & Adjustment Briefs Participation tracking 	December 2026 – January 2027	
Payment 5	PHASE 5 - Learning, Impact & Closeout (Objective 5)	Deliverable 5: Cohort Learning & Knowledge Products <ul style="list-style-type: none"> Post-Program Action Plans Cohort Synthesis Brief Public-facing knowledge products Final report & project closeout 	January – February 2027	
TOTAL PROJECT COST - <i>Must not exceed</i> \$90,000				