



REQUEST FOR PROPOSALS FOR MHP'S STRATEGIC PLANNING PROCESS

A. MHP's Goals

The Massachusetts Housing Partnership (MHP) is seeking a consultant to support the organization and our stakeholders in the creation of a five-year strategic plan. The consultant will work with the Executive Director, the Steering (Executive) Committee (comprised of MHP's five executive leaders), a Strategic Planning Coordination Group comprised of six strategic leaders who will serve as the primary contacts for the process, and the support of the entire organization (roughly 70 staff members in total).

The past several years had a significant impact on MHP and the affordable housing industry generally, and MHP believes it is critical to undertake this strategic planning process at this time to reaffirm our worldview and recommit to a more limited set of priorities that most effectively advance MHP's mission. In beginning this work, MHP hopes to address several issues, including multiple uncoordinated strategies across internal teams; balancing many successful ideas and programs but limited resources and time; and regaining control over our strategic priorities and interests.

Our goals for the strategic planning process are the following:

- **Review MHP's mission and vision & develop a theory of change.**
 - Articulate MHP's value proposition and worldview.
 - Assess MHP's mission and vision statement.
 - Develop MHP's theory of change and create an impact statement in line with MHP's existing or revised mission and vision.
 - Assess MHP's current momentum and growth and reach consensus on whether and what extent all new programs/growth advance MHP's mission and worldview.
- **Define MHP's strategic priorities for the next five years.**
 - Analyze what has changed in the last 3-5 years re: COVID, impact of hybrid work, organizational capacity, administration of federal funds and programs, etc. in relation to its impact on MHP's future strategic priorities.
 - Provide ample opportunity for all interested staff and board members to participate in a process with facilitated conversations.
 - Work with MHP team to identify and seek out additional input from outside stakeholders through facilitated conversations.
 - Identify MHP's strategic questions/challenges and our agreed upon priorities for the next five years.
- **Develop a plan to operationalize our strategic and business priorities.**
 - Incorporate discussions around succession planning and methods to ensure the proper transfer of institutional knowledge, both in the short-term (1-2 years) and long-term (3-5 years).
 - Develop implementation strategies, including at minimum a three-year business strategy, which will be used after the formal strategic planning process to ensure MHP's strategic priorities will be executed, and its financial and people resources will be managed effectively to keep staff from being stretched too thin.



B. HISTORY & ORGANIZATIONAL STRUCTURE

Background

MHP was created in 1985 to foster civic leadership on affordable housing and break down local barriers to housing development through effective guidance, advocacy, research, programs, provision of long-term capital, and technical support. Our mission is to pioneer new development and financing tools that make more effective use of public resources, are responsive to local needs, promote racial equity, and achieve more impact than conventional approaches to affordable housing. We further our impact by working in concert with the Healey Driscoll Administration, the Executive Office of Housing and Livable Communities (EOHLC), our sister organizations, and housing advocacy organizations with a focus on innovation and fulfilling unmet needs in the housing ecosystem. Examples of our history of innovation and leadership can be found [here](#).

Mission & Current Strategy

MHP was created as a quasi-public agency to promote greater equitable access to the housing market in the Commonwealth. MHP's work has long focused on removing barriers, leadership in the policy space, and increasing access to housing opportunities, particularly first-time homeownership and producing affordable rental housing. MHP believes that it must first be a strong, inclusive, mission-driven organization to effectively maximize our impact in the affordable housing industry across all the communities of the Commonwealth.

The framework for MHP's FY2024 goals includes increasing the supply of affordable housing with an emphasis on sustainability, closing the racial wealth gap with homeownership and down payment opportunities, promoting housing stability with research and administration of federal funds, and re-thinking location efficiency for multifamily housing through the lens of transit orientated development. Our FY24 goals can be found [here](#) and our first quarter goals report can be found [here](#).

Current Work & Team Structure

MHP's programmatic work is focused in four main areas:

1. Community Assistance – MHP supports communities, housing authorities and non-profit housing organizations in their efforts to create affordable housing for low- and moderate-income families. The team has provided technical assistance in over 335 communities (out of a total of 351 in Massachusetts) on issues such as drafting a Request for Proposal to develop town-owned land for affordable housing, assisting with developer selection, helping communities zone for increased density, assessing site feasibility and providing other pre-development activities, providing guidance on state/local resources available to communities, and establishing Municipal Affordable Housing Trusts (MAHTS). The team also hosts virtual and in-person trainings throughout the year geared towards officials, volunteers, and employees in



Massachusetts communities. More information about assistance offered can be found [here](#) and on the [Housing Toolbox website](#).

2. **Rental Financing** – With private bank funds and other capital sources, MHP has provided \$1.9 billion for the financing of over 30,000 apartments across Massachusetts. We are focused both on the redevelopment and stabilization of housing in distressed neighborhoods and on the creation of new housing in areas with access to jobs, transportation and good schools. MHP has a history of financing deeply affordable as well as mixed-income housing that spans a range of incomes and alleviates concentration of poverty. In recent years we've turned our focus to offering long-term financial incentives to developers and owners who incorporate green and healthy features into their affordable multifamily properties. More information about loan products offered can be found [here](#).
3. **Homeownership** – The ONE Mortgage Program, formerly called SoftSecond, has helped over 25,000 low- and moderate-income families in 307 communities buy their first home in the Commonwealth. The ONE Mortgage incorporates key features to break down barriers that prevent creditworthy families from buying a home including inadequate consumer education, high interest rates and fees, excessive down payment requirements, compulsory mortgage insurance, and a bias against two- and three-family properties. ONE is helping families build wealth and helping the Commonwealth close the racial homeownership gap, with households of color comprising 68 percent of recent ONE homebuyers. In June 2020 the team partnered with the City of Boston to offer ONE+Boston, designed to increase the buying power for income-eligible, first-time Boston homebuyers purchasing a home within the City. In addition to ONE+Boston, the homeownership team was part of a state effort to increase homeownership opportunities in the 29 communities that were disproportionately impacted by the COVID-19 pandemic with the MassDREAMS down payment and closing cost assistance program. MHP's ONE Mortgage, ONE+Boston, and our MassDREAMS efforts have been particularly successful in reaching and supporting households of color and LMI households. In FY23, households of color made up 69 percent of those receiving a ONE mortgage statewide, 68 percent in Boston and 85 percent in Gateway Cities. Households earning below 80 percent of the area median income (AMI) made up 56 percent of borrowers statewide, 62 percent in Boston, and 47 percent in Gateway Cities. MHP's MassDREAMS program is similarly reaching households of color and low- and moderate-income (LMI) households, serving 76 percent households of color and 65 percent LMI statewide, and 84 percent households of color and 60 percent LMI in Gateway Cities.

The homeownership team also designed and administered the state's Housing Assistance Fund (HAF). Launched in Dec. 2021, HAF worked with over 294 mortgage servicers to channel more than \$125 million in mortgage relief on behalf of more than 5,900 homeowners whose ability to make their mortgage payment was impacted by COVID-19. More information about all of our homeownership initiatives can be found [here](#).
4. **Data & Policy** – The Center for Housing Data aggregates, visualizes and makes data accessible and available to all in a way that enhances conversations about housing needs and policy solutions. The team has done this through a combination of research and the creation of three data tools: Residency allows users to review and analyze the density of any residential parcel in the state; Transit Orientated Development Explorer (TODEX) estimates and illustrates residential



densities around all 261 Greater Boston transit stops; and DataTown provides housing and demographic information for all 351 Massachusetts communities. The team was also involved in the conception and implementation of the Housing Choice Initiative and MBTA Communities programs. More info about the CHD team can be found [here](#).

In addition to the teams listed above, we also have operational teams that focus on legal & compliance, finance & administration, and portfolio management. Our organization chart as of Sept. 2023 can be found [here](#).

C. RESPONSE REQUIREMENTS

Scope of Services & Deliverables

Respondents to this RFP should propose a set of tasks and deliverables that will achieve the aims articulated on the first page of this document, including a detailed explanation of your approach to our strategic planning process (we invite creativity and innovative approaches).

Examples of these types of tasks and deliverables include:

- Evaluate and help define MHP's needs in the planning process.
- In consultation with MHP, consultant must propose a course of action to achieve the organization's short- and long-term planning needs.
- Consultant must work with MHP staff and board to develop a long-term plan of action that includes measurable outcomes with timelines and a plan for evaluation/and or monitoring of plan implementation.
- Strategic plan brief and/or executive summary for public use.
- Undertake a staff, board and stakeholder engagement process that might include focus groups, surveys, interviews, or other approaches defined by the consultant.

MHP expects that the above will necessitate frequent meetings, work outside of meetings, and stakeholder engagement. MHP is fully committed to doing what it takes to achieve this goal.

Project Schedule

MHP seeks to initiate the strategic planning cycle in January/February 2024. We expect this engagement to last 6-9 months. We anticipate a mix of in-person and virtual meetings, including the possibility of the consultant participating in two MHP board meetings (dates TBD).

Deliverables will be presented in draft to the Steering Committee and Strategic Planning Coordination Group in April/May, another draft will be presented to the full board in June 2024, final plan to be delivered to MHP on or before Sept. 30, 2024.

Proposal Details

Responses are due no later than **Friday, Jan. 12, 2024 by 5:00 EST**. Responses may be submitted electronically to cclark@mhp.net and mhembree@mhp.net.



Your response should provide background information of your organization, including, at minimum:

- Organization name, website, telephone, and primary contact information.
- Description of your experience developing strategic plans and your unique view, approach, or process used to create a highly impactful and actionable plan for your client.
- Sample of recent Strategic Plan final deliverable completed by organization.
- Your experience in helping organizations to develop their theory of change as part of a strategic planning process, and the process and timeframe that you would propose for this engagement.
- Description of you or your organization and your history working with mission-driven organizations. Please note what industries or sectors you have worked with in the past.
- Short biographies/background of key staff that would be working directly with MHP and leadership of the organization, including information on whether the organization is certified by the Commonwealth's Supplier Diversity Office.
- Commitment to Diversity, Equity, Inclusion, and Belonging principles, such as your organization's DEIB pledge/commitment, and information about how the organization plans to integrate a DEIB lens in the context of the strategic plan.
- Contact information for the primary individual(s) who should receive follow up communication related to the RFP.

Your response should provide information on the following specific areas:

- Estimated costs and anticipated expenses for this effort, including billable rates as applicable.
- Ongoing communication and project management expectations and needs, including the role of an internal strategic planning coordination group at MHP, the expected participants, and the proposed time commitment.
- Proposed approach to receiving feedback/input from staff as well as outside stakeholders.
- Anticipated commitments/expectations for leadership, Board, and staff, specifically noting events where MHP's full staff would be involved, if at all.
- Delivery schedule and timelines, with the following benchmark dates in mind:
 - April 2024 board meeting (TBD)
 - June 2024 board meeting (TBD)
 - September 30, 2024, completion date
- Description of the proposed work product and plan for delivery and presentation of the strategic plan.
- Contact information for 2-3 references.

MHP reviews proposals and hires consultants with a lens towards diversity, equity and providing equitable access to communities that have been historically underserved on the basis of race, color, ethnicity, gender, national origin, age, religion, sexual orientation, disability, marital or familial status, ancestry, or status as a veteran. Businesses owned and/or primarily operated by individuals who identify as a member of one or more of these communities are strongly encouraged to apply.

For any questions about this RFP, please contact cclark@mhp.net.