

Date: July 21, 2026

To: Interested Technical Assistance Providers/Consultants
From: Roberta Rubin, Director of Housing Development and Preservation, CEDAC
Re: RFP for Contracted Technical Assistance/Consulting Services

Overview

The Community Economic Development Assistance Corporation (CEDAC) is requesting proposals from qualified professionals who are interested in providing contracted technical assistance (TA) and/or consulting services to assist Boston resident-controlled housing (RCH) organizations under CEDAC's Tenants at Risk Program contract with the City of Boston Mayor's Office of Housing (MOH TAR Contract). The initial contract period will be nine (9) months, extendable for up to five (5) one-year periods contingent on extension of the MOH TAR Contract and mutual agreement of the parties.

The MOH TAR Contract calls for CEDAC to provide TA to cooperatives and other forms of RCH through contracts with one or more TA providers that specialize in RCH and/or related services such as property management, asset management and development consulting. As described below, CEDAC is seeking three broad categories of services:

- (1) Governance and Board Stewardship – training and TA for Boston RCH organizations (RCOs) with a focus on building and reinforcing the legal and organizational foundations of those organizations.
- (2) Property Management Oversight – support for Boston RCOs with a focus on enhancing the relationship and professional interface between the RCO and their property management firm
- (3) Capital Planning and Development – specialized TA to help Boston RCOs navigate the technical and financial complexities of building preservation and modernizing infrastructure.

Within each of these three broad categories, some tasks may be better suited to some consultants' expertise than others. Interested TA providers and consultants, each hereafter referred to as a Consultant, may submit a proposal to provide specified services in any or all of these categories. Proposals from consultant teams bringing a range of skills are welcome. CEDAC's annual budget for all of these services is \$130,000; within that budget CEDAC estimates that:

- Approximately \$80,000-\$100,000 will be available for services in category (1),
- Approximately \$15,000 - \$25,000 will be available for services in category (2), and
- Approximately \$15,000 - \$25,000 will be available for services in category (3).

Actual program budget allocation across categories will be determined based on the proposals received.

The deadline for submitting a proposal is 5 PM on Tuesday, August 18, 2026. Proposals must be submitted electronically at proposals@cedac.org.

Organization Description

CEDAC is a quasi-public agency of the Commonwealth of Massachusetts, and a 501 (c) (3) tax-exempt corporation. CEDAC's major program area is affordable housing. CEDAC provides predevelopment and acquisition financing and technical assistance to non-profit and resident-controlled organizations for the development, preservation, and rehabilitation of affordable housing and works closely with state and municipal agencies, including the Mayor's Office of Housing of the City of Boston. Please visit CEDAC's website for more information CEDAC.org.

Scope of Services Required

As noted above, CEDAC is seeking services in three separate categories. A Consultant responding to this RFP may offer to provide services in one, two or three of the following categories:

Category 1: Governance & Board Stewardship

General Focus: Building the legal and organizational foundation of the RCO, including implementation of best practices and guidance in handling or mitigating conflicts of interests.

Skill set required: The Consultant providing services in Category 1 should be experienced in providing training and technical assistance to RCOs, including limited-equity cooperatives, including:

- **Formal training:** Ability to design and conduct effective formal board and member training events
- **Information/data analysis and presentation:** Ability to present information and data clearly to persons with a broad range of knowledge and diverse backgrounds, in plain language, breaking down concepts as needed to communicate effectively with board and RCO members
- **Ongoing support:** Ability to provide effective, informal, ongoing support to RCO boards and members, balancing development of relationships and rapport with establishment of clear boundaries and communication of necessary information
- **Conflict management:** Skill at navigating conflict and in assisting RCO boards and members to navigate conflict among themselves and with third parties

Specific tasks/training required

- **Fiduciary Duties & Ethics:** Provide training on board fiduciary duties and legal responsibilities.
 - Develop conflict-of-interest policies and disclosure protocols.
- **Contractual Obligations:** Provide training on obligations and restrictions arising under RCO organizational documents and any recorded affordability or use restrictions.
- **Basic Financial Literacy:** Conduct training on understanding and interpreting coop balance sheets, P&L statements, audits and operating budgets.
 - This training should focus on helping RCO boards and members to understand information about their current financials and operating budgets. Financial modeling relating to capital needs is covered under Category 3 below.
 - Establish internal controls for handling and reviewing financial data.
- **Organizational Health:**
 - Formalize succession planning and board member recruitment processes.
 - Establish ground rules for civility and professional conduct.
 - Need for regular meeting cadence, minimum board participation, minutes, formal votes, annual meetings
 - Implement "distributed leadership" models to ensure oversight responsibilities are shared among all board members.
 - Centralize documentation storage for board materials, archives, and official communications.

Category 2: Property Management (PM) Oversight

General Focus: Enhancing the relationship and professional interface between the board and the management firm.

Skill set required: In addition to the skills described in Category 1, the Consultant providing services in Category 2 should have the knowledge and capacity to effectively navigate the often difficult relationships between RCOs and their property managers and to help boards to develop the knowledge and skills they will need to manage their managers, including:

- **Property Management Expertise:** Knowledge and understanding of the property management information that should be presented to boards on a monthly/quarterly/annual basis and the tools that can help RCOs to understand and evaluate this information
- **Effective Communication:** Ability to communicate effectively with all parties involved, including property managers and board/coop members, accommodating different communication styles and cadences and clearly documenting progress and areas of tension

Specific tasks/training required

- **Communication & Facilitation:**
 - Facilitate monthly PM/Board meetings to ensure productive dialogue.
 - Provide effective conflict resolution & mediation services between the board and the PM.
- **Accountability Frameworks:**
 - Define reporting standards for Monthly Management Reports.
 - Standardize Board/PM meeting agenda templates.
 - Monitor compliance with regulatory agreements, tenant selection plans, and rent/income certifications.
- **Operational Protocols:**
 - Create systems for timely board responses to PM requests and approvals.
 - Develop "Management Toolkits," including template checklists for property inspections, unit turnover criteria, and standard unit upgrades.
- **Public Subsidy Readiness:** Coordinate with the PM/Board to make sure the PM is conducting rigorous income certification to maintain eligibility for City/State funding.

Category 3: Capital Planning & Development

General Focus: Navigating the technical and financial complexities of building preservation and modernizing infrastructure. This general category encompasses two distinct areas of focus:

- A) **Board Education and General Support Specific to Capital Planning & Development:** educating RCOs, in broad terms, about what is involved in capital planning and development, including the roles and responsibilities of different third party professionals, and supporting their applications for early-stage funding to inform their planning, and
- B) **Preliminary Development Consulting Work:** procurement and analysis of assessments and technical studies, financial modeling, and board education specific to the capital planning and development process.

Skill sets required: The two areas of focus outlined as 3.A and 3.B above call for different skill sets:

- A) **Board Education and General Support: Training, Information/Data Analysis & Presentation, Ongoing Support and Conflict Management.**
 - The skill set needed to provide board education and general support specific to capital planning & development largely overlaps with the skills needed to provide services in Category 1.

- The Consultant should also have general familiarity with the tasks and professionals involved in capital planning and development and have experience putting together applications for early-stage funding.

B) Preliminary Development Consulting Work:

- The Consultant providing preliminary development consulting work should have at least 10 years' experience as a real estate and community development professional with expertise in affordable housing development and real estate finance.
- Core technical competencies include site and feasibility analysis, financial analysis, project management, budgeting and projections, contracting, and familiarity with the requirements of public funders.
- The Consultant should have specific experience in refinancing/rehabilitation of existing affordable housing and establishing priorities for the scope of work that can be done given constraints on revenue (including recorded use restrictions, RCO organizational documents, and resident concerns about the pace of rent/coop fee increases).
- The Consultant should have prior experience presenting financial models and options in an easily digestible format for clients without real estate expertise. Experience providing development consultant services to RCOs is preferred, but experience working with service provider organizations developing and/or rehabilitating housing is also relevant.

Specific tasks/training required

A) Board Education and General Support:

- **Board Education**
 - Educate board on how Net Operating income (NOI) drives borrowing capacity for capital projects & is essential to meet city/state expectations
 - Educate board on role of property manager, especially income certification & compliance with obligations under existing contracts/restrictions, and regular reporting that boards should expect
 - Educate board about additional professionals needed to carry out work:
 - Architect
 - Development consultant
 - Other professionals
- **Accessing Resources**
 - Prepare applications for early-stage funding for site investigations/consulting
 - Help RCO procure project-specific development consultant (to provide services beyond the limited scope of development consulting that can be funded under the MOH TAR Contract)

B) Preliminary Development Consulting Work:

- **Needs Assessment & Technical Studies:**
 - Commission Capital Needs Assessments (CNA).
 - Analyze, interpret and prioritize CNA.
 - Oversee specialized studies for decarbonization (e.g., BERDO compliance), environmental health, and structural integrity and integrate into overall assessment and prioritization of capital needs.
- **Development Team Management:**
 - Procure and manage specialized consultants, including architects, attorneys, and environmental engineers.

- Vet potential Joint Venture (JV) partners or Community Development Corporations (CDCs).
- **Financial Modeling & Funding:**
 - **Create Sample Pro Forma:** Create simplified sample development & operating pro formas to illustrate for the board the kind of numbers involved & dependencies & choices
 - **Project Proforma Development:** Build a detailed preliminary proforma with sources and uses, operating budgets, and projections.
 - **Strategic Prioritization:** Rank projects by urgency, weighing "Critical Needs" (e.g., water infiltration, safety) against "Quality of Life" improvements (e.g., unit upgrades).

Proposal Contents

A response to this RFP must include the following information:

- Completed cover page (see Appendix A).
- Narrative explaining how the Consultant's capabilities and experience match the requirements laid out in this RFP, including items 2-4 under Evaluation Factors/Considerations. The narrative should:
 - Describe in detail Consultant's skill set, how the Consultant will achieve each of the tasks in the category of services that Consultant is proposing to provide (as listed in the above Scope) and Consultant's prior experience providing each of these services.
 - Describe Consultant's capacity to respond to urgent matters.
- Identification of the lead professional who would be working on this engagement. Please provide a resume. If you are proposing any other professionals to be part of the team, please also specify their roles and include resumes.
- References: A list of three (3) clients whom the Consultant and/or the lead professional has worked with on similar matters, as well as the client contact's name, telephone number, and email address. References will be contacted for finalists only.
- Identification of any subcontractors that may be used to provide the services required by this RFP (such as trainers, etc.). Please describe how the Consultant will manage those relationships, specify the roles of the professionals that will be part of the subcontractor team, and include resumes.
- Your proposed fee structure. Specify whether the Consultant would perform the work on a flat fee or hourly basis and provide the following:
 - Hourly basis – hourly billing rates of lead professional and any other associates that may provide services to CEDAC.
 - Proposed flat fee arrangements.
 - Other fee structure (please describe)
 - The rates of any subcontractors that the Consultant may use in its representation of CEDAC.
- Description of the levels of coverage for professional liability insurance carried by the Consultant.

If you have questions, please make sure you email them in writing to proposals@cedac.org by 5 PM on Tuesday, August 4, 2026.

Evaluation Factors/Considerations

CEDAC will evaluate all submitted proposals based on the following considerations:

1. Completeness and clarity of submission;
2. Expertise in and available resources to address all items in the above Scope of Services Required for each service category covered by the Consultant's proposal;
3. A demonstrated record of success in past similar engagements or in providing the items listed in the above Scope of Services Required for each service category covered by the Consultant's proposal;
4. The Consultant's capacity to provide services on an on-going basis and, for particular projects, within an agreed upon timeline;
5. Competitive pricing;
6. CEDAC wishes to select the most qualified bidder(s) drawing on the broadest possible range of expertise. Certified MBE and WBE firms, as well as firms with women and minorities in senior decision-making positions, are encouraged to apply. Cover letters should highlight how the composition of the applicant's team improves their ability to provide excellent services.

Selection Process

Proposals are due by Tuesday, August 18, 2026 **at 5pm** by email to proposals@cedac.org.

CEDAC intends to interview a short list of bidders promptly and aims to make selections by the end of August, 2026. Please direct any questions to proposals@cedac.org.

Requirements for Hiring

Selected providers must complete a Conflict of Interest for State Employees training before hire.

Appendix A

Response to CEDAC's RFP for Contracted Technical Assistance/Consulting Services

COVER PAGE

(Please use this page as the 1st page of your response.)

Consultant Name: _____

Address: _____

Contact Name: _____

Contact Phone: _____

Contact Email: _____

Authorized Signatory

Date

Print Name of Authorized Signatory

Please submit proposals electronically to proposals@cedac.org by 5 PM on **Monday, August 17, 2026**.

To insure we do not miss your electronic submittal, please also email one copy of each **cover page** (NOT the entire application) to the CEDAC offices at the following address:

CEDAC
18 Tremont Street, Suite 500
Boston, MA 02108
Attention: Roberta Rubin