



Request for Qualifications for Homeowner Services

July 2017

PURPOSE

The Center for New York City Neighborhoods, Inc. (the “Center”) is pleased to announce the release of its 2017 multi-service Request for Qualifications (“RFQ”) to New York City legal and housing counseling service providers (“Applicants”).

It is through this RFQ that the Center plans to select its Network Partners, who must be qualified under at least one of the Service Project Areas below. Once qualified, Network Partners can apply to participate in the Center’s grant funded programs through separate Requests for Proposals (RFPs) or invitations.

NEW ADDITIONS TO THE 2017 RFQ

The 2017 RFQ includes a description of Network Partner Expectations, a list of standards that the selected Network Partners will be expected to meet.

Previously qualified partners only need to respond to:

- Question 1b, below, regarding their commitment to meeting these expectations,
- Question 1c, below, if there have been any changes from any previous RFQ submission, and
- Question 1d; please provide updated information.
- Question 2e, if partners wish to seek qualification for Home Repair and Energy Saving Services, which has been added as a new Service Project Area in 2017.

New applicants are asked to reply to all relevant questions.

NETWORK PARTNER EXPECTATIONS

High Quality Services:

- **Stay up-to-date:** Maintain deep and current knowledge of available programs and resources for homeowners
- **Train staff on programs and resources available to homeowners:** Identify available training and certifications that are relevant and ensure that staff are appropriately trained, including on how to protect homeowners’ sensitive data

- **Provide expert advice and assistance:** Explore all available options for clients and efficiently pursue options where appropriate
- **Evaluate program effectiveness:** Seek stakeholder feedback on quality of services as well as on whether services are meeting homeowner needs

Robust Program Management:

- **Closely supervise staff:** Ensure clear ownership and overall responsibility for satisfying the Network Partner Expectations and ensure that all work performed by staff is adequately supervised to ensure the effective delivery of services
- **Follow a program management plan:** Include occasional randomized case review for individual services
- **Report required program data:** Where appropriate, provide information to the Center in a timely manner and with a minimum of errors
- **Create consistency across the network:** If applicable, use (but please do not alter) materials from the Center

Coordination and Collaboration:

- **Demonstrate the impact of the network:** Provide feedback to the Center on outreach efforts, provide homeowner stories, and highlight homeowner needs and challenges
- **Improve effectiveness through collaboration:** Share experiences, including best practices and lessons learned, and homeowner resources with the Center. Respond to questions, requests and feedback from Center programs
- **Promote common resources:** Provide website links to the Center and other homeownership services partners or resources as appropriate

PROPOSAL REQUIREMENTS

1. **General Information:** Please complete this section only once -- it will be applicable for each Service Project Area. (1-2 pages)
 - a. **Experience:** Provide a brief description of your organization including its mission, number of years working on homeownership issues, geographic (citywide, borough, neighborhoods) areas served, services provided, number of housing counselors and/or attorneys, outreach staff (if applicable), and any other staff providing homeownership-related assistance.
 - b. **Network Partner Commitment:** Explain how your organization meets or plans to meet the Network Partner expectations of high quality services, robust program management and coordination and collaboration.
 - c. **Geographic Coverage:** Please provide an estimate of the percentage of clients your organization assists with homeownership services that reside in each borough:

New York City Coverage

Queens	%
Brooklyn	%
Staten Island	%
Bronx	%
Other (outside NYC)	%

Please list neighborhoods in which your program has a strong local presence, through either your organization or community-based partnerships.

d. Minimum Requirements: Please confirm that your organization meets these minimum requirements and provide the following requested documentation:

1. Must be designated as a 501(c)(3) tax-exempt organization in New York State with an active New York State Charities registration number. Please submit a copy of the 501(c)(3) determination letter as **Appendix A**.
2. Must have been providing free, locally based one-on-one and in-person homeownership services in New York State for at least the past three (3) years.
3. For housing counseling agencies: Organizations must be certified by the United States Department of Housing and Urban Development (HUD), or have HUD Certification through an approved HUD intermediary, or provide a letter indicating that your organization is seeking HUD approval.
4. Must have at least one staff member who is: a) for housing counseling Applicants, certified by HUD or a nationally-recognized training institution such as NeighborWorks, NCLR, and NHNLA, relevant to the Service Project Area(s) applied for; and/or b) for legal service providers, an attorney in good standing with the New York Bar Association. Copies of relevant certifications may be requested by the Center.

2. Programmatic Qualifications: Please answer the questions below for any Service Project Area your organization wishes to qualify for. (1-2 pages for each Service Project Area)

A. Outreach and Education: Coordinated outreach targeting homeowners or other populations in need of homeownership services. Qualified organizations will have experience conducting homeowner outreach activities, such as: door knocking, community events, workshops, phone banking, and/or other effective outreach strategies.

1. Describe your organization's experience with outreach and education. What types of outreach and education have you engaged in? Who were the targets of the outreach (demographics)?
2. Provide an estimate of how many people your organization has reached in the past year. What methods were employed (mail, door, phone, other)?

3. How does your organization manage its current outreach program? Does your organization have staff dedicated to outreach?
4. How do you collect data and measure the impact of your organization's outreach?
5. What is your organization's preferred method of outreach? What existing local relationships do you have and how do/would they enhance your program?
6. What (if any) changes to your outreach program approach described above does your organization plan on changing going forward ?

B. Foreclosure Prevention Services: Provide foreclosure prevention advice and assistance. Qualified organizations will have experience and expertise in one or more of the following areas: pre- and post-modification counseling, legal advice/ assistance/ representation, tax lien assistance, scam prevention/mitigation counseling, assistance with short sales, deed in lieu of foreclosure, housing mobility, and/or other foreclosure prevention services.

1. Please describe the foreclosure prevention services your organization offers, highlighting any unique, ancillary, or specialized services that you perform in-house. Some examples of ancillary service may be resolving other debts, post-modification counseling, applying for benefits, or bankruptcy loss mitigation.
2. Describe how your foreclosure prevention services are managed and how you measure the impact of your work. Please include how staff are supervised, trained, and supported by their supervisors.
3. What (if any) changes to your foreclosure prevention program approach described above does your organization plan on changing going forward?

C. Senior Homeowner Services: Provide effective interventions and resources to senior (defined as age 62 and older) homeowners. Qualified organizations will have experience and expertise in one or more of the following: home retention, or transition to stable housing if home retention is not viable; assistance with wills, trusts, and other tools as it relates to the transfer of a home to heirs, reverse mortgages, and other issues.

1. What is your organization's experience providing services to senior homeowners? What type of advice and assistance do you provide?
2. How many senior homeowners have you assisted in the past year?
3. How does your organization collect data and measure the impact of your senior assistance program?
4. What (if any) changes to your senior services program approach described above does your organization plan on changing going forward (if any)?

D. Prospective Homebuyer Counseling: Counsel aspiring homeowners to become mortgage-ready by understanding the risks and rewards of homeownership, determining what home price is affordable to them, working to help them become financially prepared to purchase and maintain a home. Assist in identifying home purchase programs and products to

fit the homebuyer's needs. Organizations applying for Prospective Homebuyer Counseling will demonstrate robust pre-purchase counseling knowledge and experience.

1. What is your organization's experience offering counseling services to prospective homebuyers? Please provide a description of the counseling process, including both group services and one-on-one counseling offered from intake through home purchase.
2. How do you help clients evaluate their readiness for homeownership? Describe how you help them identify and address barriers to homebuying.
3. How does your organization track data for homebuyer counseling? How many prospective homebuyers has your organization assisted in the past year?
4. What outcomes has your organization achieved for prospective homebuyers who sought services from your organization? How many have successfully purchased a home in the past year? How do you measure the impact of your program?
5. What (if any) changes to your prospective homebuyer counseling program approach described above does your organization plan on changing going forward?

E. Home Repair and Energy Saving Services: Identify repair and energy saving programs and products that fit the homeowner's needs. Counsel homeowners on the options available to them, and assist them in obtaining the grant, loan, or direct services that they may need to access repair and energy saving programs.

1. What is your organization's experience offering home repair and energy saving services?
2. Does your organization directly offer a loan, grant or direct repair program or product? Please describe.
3. How does your organization help clients determine what they qualify for and evaluate their options?
4. How does your organization track program activities and homeowner data? How many homeowners has your organization assisted with home repair and energy saving services in the past year?
5. What outcomes has your organization achieved in the past year? How do you measure the impact of your program?
6. What (if any) changes to your program approach described above does your organization plan on changing going forward?

PROCESS

RFQ responses will allow the Center to qualify certain Applicants for one or more of the homeownership services included in this RFQ ("Service Project Areas"). The Center may elect to extend future RFPs and/or invitations to participate in new programs to all or some partners qualified through this RFQ.

New RFQ applicants, if successful, will be qualified for one year, with the possibility of annual renewal through a short form renewal process and by providing updated organizational documents as needed, for up to three years, in one or more of the Service Project Areas. Your organization may apply for one

or more Service Project Areas, and the Center may qualify your organization for one project area, several project areas, or none of the project areas.

RFQ submissions will be evaluated based on your organization's thoughtful responses to the questions in each section below.

Organizations wishing to respond to this RFQ for both legal services and housing counseling should complete separate applications (one for housing counseling and one for legal services). Applications must be from individual organizations, rather than partnerships. Applications from partnerships will not be accepted.

In order to be considered for qualification, please submit responses to proposals@cnycn.org with the subject line 'Center 2017 RFQ'. Please direct any questions via email to proposals@cnycn.org using the same subject line. Applications (and revised applications, if an organization increases or otherwise changes its capabilities) will be accepted on a rolling basis to allow organizations to apply for qualification on an ongoing basis; however, we will only review submitted applications quarterly.