



Massachusetts Housing Finance Agency

**One Beacon Street
Boston, MA 02108**

REQUEST FOR PROPOSALS

FOR

Tenancy Preservation Program (TPP)

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I. STATEMENT OF PURPOSE

MassHousing is requesting proposals pursuant to this Request for Proposals (“RFP”) for service providers to enter into a 2-year contract with the option of four 2-year extensions for a total of 10 years. The services for which MassHousing is requesting proposals consist of court consultation and short-term case management and housing stabilization services. The total amount of contract funding available statewide is \$2.7 million.

The Tenancy Preservation Program (TPP) is a specialized homelessness prevention program. TPP works with tenants, including families, facing eviction for behaviors related to disabilities and serious medical conditions, e.g., behavioral health disorders, aging-related impairments, that substantially limit one or more major life functions. TPP’s primary goal is to preserve tenancies by addressing the immediate lease violation as well as the underlying health issues that caused the violations by developing a reasonable accommodation and housing stability plan and connecting the tenants to community-based services.

MassHousing manages TPP in partnership with the Executive Office of Housing and Livable Communities and MassHealth, and seeks one (1) qualified provider in each of the six (6) [Housing Court divisional jurisdictions](#) to deliver TPP services.

II. BACKGROUND

MassHousing provides mortgage financing and related services targeting the affordable housing market in Massachusetts. Created in 1966 by an act of the Massachusetts Legislature, MassHousing operates as a self-supporting, independent authority of state government. MassHousing raises mortgage capital through the issuance of taxable and tax-exempt revenue bonds and is organized around six primary business lines: Rental Business Development, Rental Underwriting, and Rental Management, Home Ownership Lending Operations, Home Ownership Productions, Home Ownership Servicing and Operations, and the Mortgage Insurance Fund. Support services such as accounting and financial reporting, legal, and information technology are provided by a group of corporate offices.

MassHousing’s Rental Management business line oversees a portfolio comprised of mortgage loans originated by MassHousing’s Rental Business Development and Rental Underwriting business lines, and this entire portfolio is serviced in-house. MassHousing’s servicing of this portfolio includes regulatory oversight and compliance with requirements stemming from various housing subsidy contracts. Rental Management also provides regulatory and subsidy contract administration services to other entities, principally the United States Department of Housing and Urban Development (“HUD”). The Housing Stability Department works with the Rental business lines to promote positive tenancies through programming, investments, training, and technical assistance. The Housing Stability Department is the sponsor of this RFP.

MassHousing’s Home Ownership Servicing and Operations business line oversees a portfolio of single-family mortgage loans to first time homebuyers and other qualified borrowers. These

loans were originated by MassHousing-approved lenders across the state under MassHousing's auspices and then subsequently purchased and serviced by MassHousing.

The Mortgage Insurance Fund ("MIF") was established to provide an additional source of primary mortgage insurance for certain borrowers. MIF is the primary insurer for single-family loans made by MassHousing and is also an insurer approved by the Federal Home Loan Mortgage Corporation (Freddie Mac), the Federal National Mortgage Association (Fannie Mae) and Massachusetts community banks and credit unions.

For additional information about MassHousing, please visit our [website](#). For a detailed overview of MassHousing, including its financials, please review the most recent MassHousing Information Statement, and Annual Report. Both of these documents as well as others can be found on MassHousing.com website at <https://www.masshousing.com/en/about/investors>.

III. SCOPE OF WORK

TPP operates in collaboration with the Housing Court Department of the Massachusetts Trial Court and functions as a neutral party to the landlord and tenant dispute, by providing reasonable accommodation consultation services to the Court and landlord, and short-term case management and housing stabilization services to the tenant and other household members.

TPP staff assess the reasons for the eviction, determine whether the lease violating behaviors can be reasonably accommodated, identify services to address both the immediate lease violation and the underlying health issue(s), develop a housing stability plan to maintain the tenancy, and monitor the case until the tenancy is stabilized and/or longer-term services are in place (6-9 months on average).

TPP makes regular reports to all parties involved in the case, i.e., the Housing Court, the landlord and tenant, and their attorneys, regarding progress and compliance with the housing stability plan, which may include information that is detrimental to the tenant's defense. TPP may be asked by the Court to provide this information during a hearing or trial.

Housing Court and Referrals

TPP staff attend most Housing Court sessions and are available to Court personnel as requested to:

- Join mediation sessions with the Housing Specialists Department, the landlord and tenant, and their attorneys;
- Assess referrals for initial program eligibility;
- Participate in hearings or trials for tenants involved with TPP to provide information on progress and tenant compliance with housing stability plans; and
- Provide information and referral services to ineligible or wait-listed referrals.

TPP is also available as an upstream intervention before the start of eviction proceedings, i.e., pre-Notice to Quit. Upstream referrals are made by landlords, community providers, and tenants themselves.

TPP must assess all referrals for eligibility determination. If there is insufficient staff capacity to assist all eligible cases, waiting lists of upstream referrals may be maintained.

For information about the number of Housing Court Summary Process filings, please review the [Massachusetts Trial Court website](#). TPP cases generally represent 1-5% of total Summary Process filings statewide.

The respondent will be responsible for all TPP related matters in the Housing Court sessions for the respective Housing Court Division they are seeking to serve. See Attachment A – Housing Court Divisional Sessions TPP Schedule.

The respondent will assess all referrals for eligibility, communicating the outcome of the eligibility determination to the referring and other interested parties, and providing brief information and referral services to ineligible and wait-listed referrals. See Attachment B – TPP Eligibility Determination Process Chart.

Respondents must familiarize themselves with all aspects of TPP operations by reviewing the [Operations Manual](#).

Program Requirements

The respondent will deliver TPP services in all the communities covered by the respective Housing Court Division(s). These services include, but are not limited to, home visits with TPP participants, arranging for or providing transportation to participants for necessary appointments, and providing short-term case management services to address housing instability.

The respondent will serve a minimum of fifteen (15) eligible households per year for each full-time TPP employee, with a homelessness prevention rate of eighty-five percent (85%).

The respondent must maintain the staffing levels indicated in the program budget for the term of this contract, unless there is a change in funding.

The respondent agrees to provide TPP staff with regular access to Master's-level supervision to review clinically challenging cases.

The respondent will implement policies and procedures to promote TPP staff safety. These policies and procedures shall address, at minimum, staff safety trainings, equipping staff with cell phones, contacting and/or finding staff in case of emergency, first meetings with residents, home visits, residents' pets and visitors, and sanitation/infestation issues.

The respondent will assist MassHousing TAP-enrolled properties with residents with hoarding behaviors who meet TPP eligibility by using contract funds set-aside for this specific purpose.

Funding, Billing, and Documentation

TPP is funded by the Massachusetts Executive Office of Housing and Livable Communities (EOHLC), MassHousing, and MassHealth's Community Support Program – Tenancy Preservation Program (CSP-TPP).

The respondent is expected to review TPP participant MassHealth coverage and address any issues to enroll eligible members in CSP-TPP whenever possible and agrees to bill MassHealth and its contracted managed care health plans, either directly or through a 3rd party, for CSP-TPP services for MassHealth eligible members before seeking reimbursement from MassHousing and EOHLC. Monthly TPP invoices are submitted to MassHousing for reimbursement and must include details on CSP-TPP revenue offsets. It is anticipated that at least 50% of opened cases will be eligible for CSP-TPP enrollment.

The respondent must maintain tenant files (paper or electronic), with documentation of referral, assessment, and eligibility determination, releases of information, program participation agreement, housing stabilization plan, progress notes, and service discontinuation notice. MassHousing will conduct at least one file review during each contract term. If deficiencies are identified, the respondent shall develop corrective action plans to address the deficiencies.

The respondent agrees to provide MassHousing and MassHealth with statistical Monthly Reports (see Attachment C – SAMPLE BLANK TPP Monthly Reporting Form and Attachment D – SAMPLE CSP-TPP Biannual Reporting Form), and other information as requested by MassHousing.

Local Advisory and Statewide Steering Committee Meetings and Other Events

The respondent will coordinate and facilitate local advisory committee meetings comprised of program stakeholders, including but not limited to the Housing Court, legal services, housing providers, and state agencies serving people with disabilities, and to participate in TPP Statewide Steering Committee meetings. These meetings shall occur at least quarterly for the term of this contract.

The respondent further agrees to participate in TPP marketing, training, and other events as requested by MassHousing.

IV. CONTENT OF PROPOSALS

This RFP is designed to elicit all information considered essential to evaluating each proposal. There is no intent to limit the content of the proposals. Respondents may include such additional

information as may be appropriate, or offer alternate solutions, but should not exclude any information requested in this RFP.

In support of MassHousing's longstanding commitment to confront the housing challenges facing the Commonwealth to improve the lives of its people, MassHousing will prioritize organizations who align with the Agency's values and its commitment to diversity, equity, and inclusion.

All proposals must be in 12-point font with 1" margins, no longer than 10-pages, and should contain the following information:

A. Transmittal Letter/Firm Description/Executive Summary

Proposals must be accompanied with a transmittal letter on company stationery or letterhead and signed by an individual legally authorized to bind the company. The transmittal letter should identify the individual(s) involved in preparing the proposal, as well as a single point of contact for the company. The transmittal should contain or be accompanied by a detailed description of the firm (including background on the provider's financial stability) as well as a summary of the contents of the proposal.

MassHousing is an equal opportunity employer and seeks to provide procurement, contracting and employment opportunities for minority, women, veterans, LGBT, and persons with disabilities. We encourage responses from entities which describe strategies to actively promote and recruit diverse vendors, workers, and contractors. Responses that describe the benefits of direct, specific, and measurable access to employment and contracting opportunities created by the proposed project will be favorably reviewed.

B. Experience and Qualifications

Proposals should describe the relevant experience of the provider and of the key personnel that will be providing the services. Relevant experience includes not only services similar to those being sought by MassHousing but also any past experience as a provider under contract to a Massachusetts state agency.

Please address the following items in responding to this Request for Proposals.

1. Experience providing intensive, short-term case management services to and developing reasonable accommodations plans for housing unstable individuals and families with disabilities and other serious medical conditions in the community. Please provide a brief narrative summary of your organization's experience in this area, as well as that of key personnel to be involved in program operations.

2. Experience operating in a court environment. Please provide a narrative summary of your organization's experience operating within a court environment, as well as that of key personnel to be involved in program operations, with an emphasis on Housing Court or eviction cases.
3. Experience providing information and referral services to housing unstable households ineligible or waitlisted for TPP. Please provide a sample list of referral resources in the communities you are seeking to serve.
4. Experience billing for CSP-TPP or similar MassHealth services. Please provide a brief summary of your organization's experience billing MassHealth and its contracted managed care health plans, either directly or through a 3rd party.

C. Diversity, Equity & Inclusion Plan

Please provide the following information about your organization's commitment to the principles of diversity, equity and inclusion and related activities.

Organizational and Workforce Diversity

1. Describe your organization's activities that reflect your commitment to diversity, equity and inclusion and the impact, if any, it has on your organization's competitive position.
2. Describe the diversity makeup of your Board of Directors and executive leadership team. Please provide the breakdown by gender and ethnicity.
3. Please provide documentation if your company is certified as a diverse business (M/WBE, veteran-owned VBE, LGBT-owned, and/or disability-owned business).

Vendor/Consultant/Supplier Diversity

1. For all vendor/consultant/supplier goods and services purchased in the last three years, what is the dollar volume/percentage paid to M/WBE, veteran-owned VBE, LGBT-owned, and/or disability-owned businesses?
2. What are your proposed partnerships, spending goals and commitments regarding increasing purchases of goods and services from diverse businesses?

D. References

Please provide a list of at least three (3) organizations that MassHousing can contact as references. At least one of the references must speak to the respondent's experience operating in a court environment. At least one of the references must be from an affordable housing operator or the counsel for an affordable housing operator.

1. Name, address, and phone number of each organization.

2. Contact name, email address, and telephone number(s) of those who can talk knowledgeably about their experience with the respondent.

E. Project Plan

Provide a step-by-step project plan for performing and completing the solicited services as described in III. SCOPE OF WORK.

Project Plans must demonstrate a clear understanding of TPP's role relative to the Housing Court, landlords, tenants, and their representatives.

Proposals for serving partial Housing Court Division jurisdictions will not be considered.

Your Project Plan should include:

1. Key personnel and their roles in providing the service. The staffing plan, including the provision of master's-level supervision for staff. Respondents should attach job descriptions and staff resumes (not counted towards the page limit), if available.
2. Your general approach in providing the services.
3. Details about how the project will launch on July 1, 2025, including hiring plans if the staff are not already in place, a list of deliverables, sign-off points, timelines, milestones, software components (if any), subcontractors, and training.
4. Expectations of MassHousing's staff to assist with the process.

F. Adverse Actions

Please include a description of any insurance claim, criminal investigation or material litigation against your firm or members of your firm in the last ten (10) years, any instances in which your firm has been debarred by state or federal government and the circumstances for the debarment, as well as a summary of any formal complaints filed against your firm or members of your firm containing allegations of discrimination in the last ten (10) years.

G. Conflicts of Interest

Please describe any facts you are aware of that would result in a conflict of interest with MassHousing if a contract was awarded to your firm.

H. Budget

Please provide as an attachment (not counted towards the page limit) a programmatic budget to adequately serve the Housing Court Division(s) identified. Please include projected revenues from CSP-TPP in the budget. MassHousing anticipates contracting for approximately \$2.7M in annualized statewide funds.

V. METHOD OF SELECTION/AWARD

A. Contract Award

Contract will be awarded to the respondent whose proposal is determined to be the most advantageous to MassHousing, in its sole discretion, taking into account price and other evaluation criteria as set forth in this RFP.

MassHousing reserves the right to negotiate the terms of the contract(s), including the contract amount(s), with the selected respondent prior to entering into a contract. The contents of the respondent's proposal and this RFP, and any amendments thereto, shall become contractual obligations if an engagement of services ensues. Contract selections should be distinguished from a contract award. Contracts will not be considered awarded until negotiation of terms is final. Failure of a successful respondent to accept these obligations in contractual agreement may result in cancellation of a respondent's selection. If contract negotiations cannot be concluded successfully with any selected respondent(s), MassHousing may, in its sole discretion, negotiate a contract with the next ranked respondent.

One or more contracts may be awarded as a result of proposals submitted in response to this RFP. MassHousing reserves the right to award contracts for individual deliverables if that is advantageous to MassHousing. By submitting a proposal pursuant to this RFP, the selected respondent agrees to enter into an agreement with MassHousing in substantially the same form as MassHousing's Standard Services Agreement attached hereto as Attachment E – MassHousing Standard Contract for Services 2023.

B. Evaluation of Proposals

Proposals submitted in accordance with this RFP will be evaluated by a selection committee composed of MassHousing staff. All respondents will be notified of the outcome of the review of their proposal. Proposals will be evaluated pursuant to the following criteria:

- Responsiveness to requirements of RFP
- Financial and organizational stability of respondent
- Understanding of proposed scope of services and approach in addressing MassHousing's specific needs and objectives
- Quality and timeliness of proposed work plan
- Technical capabilities (in terms of personnel, equipment, and materials) and management plan (including staffing of key positions, method of assigning work, and procedures for maintaining level of service)
- Diversity, Equity & Inclusion plan

- Demonstrated experience and qualifications of respondent and respondent’s staff assigned to perform the solicited services
- Ability to provide a cost-effective solution to meet the needs of MassHousing; and
- Demonstrated successful past performance based on references.

VI. SCHEDULE AND INSTRUCTIONS

A. Number of Proposals and Due Dates

Please submit proposals by email to David Eng at deng@masshousing.com by March 7, 2025 5:00 pm EST. Proposals received after the response deadline will, at MassHousing’s discretion, not be reviewed.

B. Summary Project Timetable

Following initial review of the proposals, MassHousing may identify those respondents it elects to interview. Interviews will be scheduled within the two (2) weeks after the response deadline and MassHousing will attempt to provide respondent’s with at least one week’s notice before scheduling an interview.

The anticipated timetable for the evaluation process and subsequent project activities are summarized below:

<u>Date</u>	<u>Task</u>
January 27, 2025	Distribute RFP
February 12, 2025, 10:00 am EST	Bidders Conference (via zoom)
March 7, 2025, 5:00 pm EST	Proposal Submission Deadline
April 11, 2025	Evaluation and Selection of Candidates for Further Review
April 18, 2025	Completion of Evaluation
May 2, 2025	Final Selection
July 1, 2025	Commence Services with MassHousing

This anticipated timetable is for reference purposes only and is subject to change at MassHousing’s sole discretion. A copy of this RFP, as well as any addenda thereto, will be posted on www.masshousing.com/rfp. Schedule changes and/or other RFP revisions, including date, time, and place changes, if any, will be posted on the website on a weekly basis. In addition,

after the RFP Response Deadline, changes may be sent directly to Respondents at the contact information provided.

C. Single Point of Contact

All inquiries regarding this RFP should be directed to:

David Eng
Email: deng@masshousing.com

In order to maintain a fair and impartial competitive process, MassHousing will only answer questions or comments regarding the RFP that are submitted in accordance with the terms of this section. MassHousing will determine, in its sole discretion, whether any inquiry requires a formal response which, if required, may take the form of an addendum to this RFP. Respondents who initiate private communications with other MassHousing personnel regarding material issues involving this RFP may be disqualified.

D. Bidder's Conference

A bidder's conference is scheduled Wednesday, February 12, 2025. [Zoom registration link](#).

VII. ADDITIONAL PROVISIONS

A. Confidentiality

By accepting to respond to this RFP, respondent expressly acknowledges that MassHousing's business procedures, ideas, inventions, plans, financial data, contents of this RFP, and other MassHousing information are the sole and exclusive property of MassHousing. The Respondent also agrees that it will safeguard such information to the same extent it safeguards its own confidential material or data relating to its own business information that is of a confidential or proprietary nature. Federal and state laws require that MassHousing maintain an information security program to protect certain personal information related to individuals who are customers, business partners, vendors, or employees of MassHousing. This information includes the following: (1) nonpublic personal information protected by the Safeguards Rule of the Gramm-Leach-Bliley Act (15 U.S.C. § 6801 et. seq.) and implementing regulations (16 C.F.R. Part 314); consumer reports protected under the federal Fair Credit Reporting Act, as amended by the 2004 FACT Act (15 U.S.C. § 1681 et. seq.); and any other information pertaining to individuals subject to data security, data security breach notification, and identity theft prevention laws. If MassHousing grants respondent access to its networks or otherwise allows respondent to view personal information related to individuals who are customers, business partners, vendors, or employees of MassHousing, respondent shall comply with all federal and state laws protecting such information while working at MassHousing's facility, while using MassHousing's protected information, and while connected to MassHousing's network. It is MassHousing's policy to employ the services of outside investigative agencies to conduct background checks on individuals with access to its networks. In submitting its proposal, respondent acknowledges that it will be required to submit to such background checks of its impacted employees at

MassHousing's request. If awarded the contract, respondent shall comply with MassHousing's information security program by (1) implementing and maintaining measures designed to meet the information security objectives of federal and state laws; (2) using and disclosing customer information solely for the purposes of performing the contract; and (3) providing MassHousing with copies of the results of any internal and external audits or tests of the effectiveness of MassHousing's information security measures.

B. Non-Discrimination

In connection with the performance of work under this contract, the respondent agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, disability, sex, marital status, familial status, sexual orientation, gender identity or expression, pregnancy, genetic information, veteran status, alienage or citizenship status, ancestry, national origin, or any other characteristic protected by applicable federal, state, or local laws. This provision shall include, but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The respondent further agrees to take affirmative action to ensure equal employment opportunities for those applicants of protected groups referred to above. The respondent agrees to post in conspicuous places, available for employees and applicants for employment, notices setting forth the provisions of the nondiscrimination clause.

C. Rights of MassHousing

MassHousing is soliciting competitive proposals pursuant to a determination that such a process best serves the interests of MassHousing and not because of any legal requirement to do so. MassHousing accordingly reserves the right to accept any proposal; to withdraw or cancel this RFP; to modify or amend, with the consent of the proponent, any proposal prior to acceptance; to reject any or all proposals or waive any informality and otherwise to affect any agreement that MassHousing in its sole judgment, deems to be in its best interest.

D. Use of Respondent Proposal

All material submitted becomes the property of MassHousing and will not be returned. If the respondent intends to submit confidential or proprietary information as part of the proposal, any limits on the use or distribution of that material should be clearly delineated in writing. Respondent should be aware that MassHousing is a quasi-public governmental agency subject to Massachusetts General Laws, Chapter 66, sections 1-18, therefore, any information submitted to MassHousing (even if marked as confidential or proprietary) may be subject to disclosure under the Massachusetts Public Records Law.

MassHousing reserves the unrestricted right to copy and disseminate the respondent materials for internal review.

E. Respondent Proposal Costs

All respondent proposal related costs, including but not limited to, proposal preparation and presentation, system demonstrations, documentation, site visits, in-depth briefing for MassHousing, and negotiation meetings are entirely the responsibility of the respondent and shall not be chargeable in any manner to MassHousing. MassHousing will bear the costs of sending its own staff to respondent headquarters and respondent client sites if such meetings are required.