



Massachusetts Housing Finance Agency
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REQUEST FOR QUALIFICATIONS

TRAINING AND INSTRUCTIONAL SERVICES

Issued by: MassHousing

Date: March 15, 2025



Maura Healey, Governor
Kim Driscoll, Lt. Governor

Jeanne Pinado, Chair
Carolina Avellaneda, Vice Chair

Chrystal Kornegay,
Chief Executive Officer

I. PURPOSE AND SUMMARY

The purpose of this Request for Qualifications (RFQ) is to solicit a list of qualified individuals committed to providing professional services to MassHousing's Housing Stability Department. Respondents who qualify under this RFQ will be placed on the list of eligible individuals to provide services on a fee for service basis as requested by MassHousing beginning March 15, 2025. Submissions under previous versions of this RFQ will remain on the list. Inclusion on this list means MassHousing will consider utilizing vendors for specific tasks at agreed upon rates as a need arises. Inclusion on this list does not guarantee any assigned work or compensation.

MassHousing welcomes and strongly encourages applications from individuals or organizations owned or controlled by people of color. Massachusetts Supplier Diversity Office (SDO) Certification is not required.

The *Type of Services* may include, but are not limited to:

- Professional Instruction for property management staff and community and direct service providers and associated materials.
- Instructional Design for existing/new topics and live/online training.
- Content development for conferences/symposiums.

The *Areas of Expertise* may include, but are not limited to:

- Fair Housing
- Domestic Violence
- Behavioral Health
- Professional Development
- Affordable Housing
- Supporting Positive Community
- Older Adults

Responses may be submitted immediately on an open and rolling basis. Successful respondents will remain on this list of qualified vendors through June 30, 2026, and extended annually as determined by MassHousing.

II. BACKGROUND

MassHousing (The Massachusetts Housing Finance Agency)

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 RFQ.

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 documents as well as others can be found on MassHousing.com website at <https://www.masshousing.com/en/about/investors>.

MassHousing's Knowledge and Capacity Building Initiatives

MassHousing's Housing Stability Department works as a thought leader to provide high quality learning opportunities focusing on the intersection of affordable housing and social issues. Trainings are for affordable and public housing property management staff and individual support providers working with residents and applicants. Trainings directly support MassHousing's mission of confronting the housing challenges of the Commonwealth to improve the lives of its people.

Trainings are open to all and free for staff of rental developers enrolled in MassHousing's Tenant Assistance Program or TAP. TAP Training offers close to 50 trainings per TAP year focusing on the intersection of affordable housing and social issues such as substance use disorder, mental health, fair housing, reasonable accommodations, VAWA (Violence Against Women Act) and domestic violence, hoarding, aging related issues and more! Trainings are currently offered as either live webinars or face-to-face in person on a trimester format of Fall, Winter, and Spring, with in-person trainings in Massachusetts only. TAP Training content is relevant for all property

management staff including Resident Service Coordinators, Property Managers, Maintenance Providers as well as external service providers, advocates and other stakeholders. Additionally, MassHousing is committed to offering content that meets each of HUD's required topic areas for HUD RSC Certification at least once per year.

Trainings are open to the general public for a low fee. TAP Members incur no additional registration fees as those are covered by their site's annual membership. To learn more about TAP Membership, please go to www.masshousing.com/tap.

III. DESCRIPTION OF SERVICES

The *Type of Services* MassHousing seeks to secure may include, but are not limited to:

- **Professional Instruction for property management staff and community and direct service providers and associated materials.**

Respondents may conduct training for groups of housing and service professionals in their area of expertise, including topics required by HUD for Resident Service Coordinator certification. In-person groups usually range in number from fifteen to fifty and are conducted at a variety of locations statewide from September through June. Training modules can be half or full day sessions. Live webinars are typically offered September through June in either 2-hour or 4-hour blocks. Both basic and advanced courses are offered. Qualified respondents may be required to attend trainings and/or initially co-instruct with long-term MassHousing trainers.

- **Instructional Design for existing/new topics and live/online training.**

Respondents may develop and/or revise curricula and materials for constantly evolving training topics. The content designer may or may not be the actual instructor. Training may also include asynchronous learning models. Content for which MassHousing has paid to be created or designed is owned by MassHousing and may not be used without permission and may incur a usage fee.

- **Content Development for Conferences and/or Symposiums.**

Respondents may develop content for conferences and/or symposiums including presentations, participation in panels, and/or workshops on the specified topic for audience sizes between 100 and 500.

The *Areas of Expertise* for which MassHousing seeks instructors and content may include, but are not limited to:

- Fair Housing (including protected classes, reasonable accommodations, 504/ADA, access for people with disabilities)
- VAWA Regulations (including domestic violence, sexual assault, and stalking)
- Behavioral Health (including substance use disorder, hoarding, trauma and mental health)
- Professional Development
- Affordable Housing (including screening and tenant selection, rent calculation and HUD's Occupancy Handbook, lease violations)
- Supporting Positive Community (including anti-racism, implicit bias, building community, cultural humility/ cultural competence, inequity, community trauma/ resiliency, allyship, communication)
- Older Adults (including aging, social aggression, death, loss and grief, dementia)

IV. QUALIFYING CRITERIA

Submissions will be considered in the following areas:

Completeness of Package Submitted

- Exhibit 1: Respondent Information Form (via electronic form)
- Exhibit 2: Narrative
- Attachments

General Knowledge and Experience

- Extensive knowledge of housing policies and operations, including those of MassHousing.

- Demonstrated experience providing services to a housing agency, including MassHousing.
- Extensive knowledge, skills and demonstrated experience in one or more of the identified “areas of expertise”, HUD Resident Service Coordinator (RSC) certification, or other relevant area.

Experience and Skill in *Type of Services* proposed

- Successful and varied curriculum development experience.
- Extensive skill in conducting engaging training at federal, state and/or local levels.
- Authorship and/or publication of relative handbooks or guidebooks, Q+As, case studies or policies and procedures.

Experience and Skill in Area of Expertise proposed

- Extensive, significant and successful experience in area of expertise.
- Extensive skill in coordinating interdisciplinary trainings and meetings of a variety of professionals.
- Success as a direct practitioner in area of expertise.

References

- Name and contact information of two professional references.
- Additional information or permission to observe instruction in the proposed area of expertise may be requested at any time.
- In some cases, offering of a pilot training at a reduced or no fee

Rate

- Competitiveness and/or comparability of proposed rate(s).
- *Note that payment for services provided will be made via the Vendor Automated Clearing House (ACH) direct deposit system.*

Education and Licensing

- Verifiable education and/or licensing or certification relevant to area of expertise.

V. SUBMISSION REQUIREMENTS

Respondents shall submit the following elements:

- Exhibit 1: Respondent Information Form (Find the form here: [Exhibit 1 Electronic Form](#))
- Exhibit 2: Narrative (5 double-spaced pages maximum)
 - General Knowledge and Experience
 - Experience and Skill in Type of Services proposed
 - Experience and Skill in Area of Expertise proposed
- Attachments:
 - Resume
 - Two references (contact information)
 - Rate information (hourly and/or daily)
 - Other forms:
 - IRS W-9 located at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
 - 501(c)3 nonprofit organization status (if applicable)
 - MA SDO (Supplier Diversity Office) certification (if applicable):
 - Certified Minority Business Enterprise (MBE) Vendor
 - Certified Women Business Enterprise (WBE) Vendor
 - Certified Minority Women Business Enterprise (M/WBE) Vendor
 - Certified Disadvantaged Business Enterprise (DBE) Vendor
 - Certified Disability Owned Business Enterprise (DOBE) Vendor
 - Certified Disabled Veteran Owned Business Enterprise (SDVOBE) Vendor
 - Certified Veteran Business Enterprise (VBE) Vendor
 - Certified Lesbian, Gay, Bi-Sexual, Transgender, Business Enterprise (LGBTE) Vendor

Respondents must meet the following submission requirements:

- All narrative must be double spaced and in 12-point font. Narrative is not required to be 5 pages but may be no more than 5 pages.

- Please submit the [electronic form](#) in addition to one complete package via email to the RFQ contact:

Kate Newbury

Housing Stability Department

MassHousing One Beacon Street Boston, MA 02108

knewbury@masshousing.com

617-854-1092

Responses may be submitted immediately on an open and rolling basis. Successful respondents will remain on this list of qualified providers through June 30, 2026, and extended annually as determined by MassHousing.

All questions about the RFQ should be directed to the RFQ contact listed above.

MassHousing is soliciting qualified individual(s) and/or vendor(s) pursuant to a determination that such a process best serves the interests of MassHousing and not because of any legal requirement. MassHousing reserves the right to accept any response, to withdraw or cancel this RFQ, to modify or amend any response, to waive any informality and otherwise affect any agreement that MassHousing deems in the best interest.

MassHousing does not discriminate on the basis of race, color, religion, sex, national origin, ancestry, sexual orientation, gender identity, age, familial status, children, marital status, veteran status or membership in the armed services, the receiving of public assistance, or physical or mental disability in the access or admission to its programs or employment, or in its programs' activities, functions or services.

Diversity-MassHousing is an equal opportunity employer and encourages responses from entities which are certified as minority and women-owned business enterprises (MBEs and WBEs), veteran-owned business enterprises (VBEs), disability-owned business enterprises (DBEs), and lesbian/gay/bisexual/transgender-owned business enterprises (LGBTBEs).

MassHousing welcomes and strongly encourages applications from individuals or organizations owned or controlled by people of color. Massachusetts Supplier Diversity Office (SDO) Certification is NOT required.

Exhibit 1 – Electronic Form: <https://forms.office.com/g/MpU9BqxUYb>

