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## **Request for Proposals (RFP)**

### **Strategic Planning Consultant**

Housing Trust Silicon Valley

#### **Background and Purpose**

Housing Trust Silicon Valley is a Community Development Financial Institution (CDFI) whose mission is to use transformative housing finance and public-private partnerships to create more equitable and affordable communities. Housing Trust provides multifamily lending, first-time homebuyer lending, and related programmatic support across 14 counties in the greater Bay Area and beyond.

Housing Trust engages in thoughtful strategic planning on a regular basis. Most recently, we completed a brief Encore Plan for FY27. Prior to that, following receipt of a Yield Giving grant, it conducted a company-wide planning effort to determine the most appropriate use of those funds and develop an implementation plan. Housing Trust is also currently developing a business plan for pilot geographic expansion beyond our 14-county region.

Housing Trust intends to engage a strategic planning consultant to facilitate a comprehensive, organization-wide strategic planning process beginning July of this year. The consultant will partner closely with executive leadership, board members, and staff to develop a three-year strategic plan that reflects Housing Trust's mission, values, and priorities—and will set a clear course for the organization's next phase of growth and impact. We want to ensure that such a plan addresses ways (if there are determined to be any) HT could leverage our existing resources/strengths for greater impact by filling gaps in our field. We seek a partner to help coalesce our collective knowledge and forward-thinking ideas to shape the vision and plan for the coming three years.

#### **Scope of Work**

##### **Objective**

The primary objective of this engagement is to facilitate a strategic planning process that produces a clear, actionable, and mission-aligned strategic plan for Housing Trust Silicon Valley. Specifically, the consultant will help Housing Trust to:

- Understand and evaluate the market landscape and conditions relevant to Housing Trust's lending and program activities
- Understand HT's strengths and how they could be used to grow impact by filling gaps in the CDFI field or affordable housing ecosystem
- Engage board members, staff, partners, funders, and community stakeholders in a participatory planning process
- Define strategic priorities, goals, and objectives aligned with Housing Trust's mission
- Develop a comprehensive strategic plan with actionable steps, measurable benchmarks, and a clear implementation timeline
- This work will be highly collaborative, engaging teams across the organization to co-create a strategic plan that is creative and reactive to the world around us as well as rigorous and practical. The consultant will support Housing Trust's strategic planning bringing its own design and tools to bear. We expect initial discovery by the consultant to rely heavily upon information we have already about the CDFI industry, state, local, and federal affordable housing resources expected to be available, and competitors. The consultant will engage with key stakeholders including a subset of board members, staff, key funders and limited community representatives to gain more direct input on creative work that could bring impact. (for budgeting purposes we imagine most engagement can happen at scheduled meetings. A scan of up to 10 external stakeholders would be HT suggestion but we are open to consultant recommendations)

The consultant would compile their learnings and the internal information available to analyze and then inform the plan.

## **Deliverables**

**Report on results of the initial discovery including analysis.** Written summary of findings including how it should inform the work.

## **Planning Retreat Facilitation**

Facilitation of two in-person retreats (board/senior staff and all-staff), and 2 senior staff only meetings including materials, agenda, and summary notes. We are interested in creative ways to engage employees, including but not limited to a staff hack-a-thon which we have conducted to great success in the past. This could be organized by the consultant or HT with the results incorporated in the all-staff retreat day.

**Comprehensive Strategic Plan (format to be proposed by consultant for HT acceptance but would include an external version for our website)**

- Executive Summary
- Statement of Strategic Direction
- Mission alignment, strategic priorities, and goals

- Action plan with implementation steps and accountability
- Success metrics and measurable benchmarks

## Timeline

Engagement duration: Approximately 8 months (July 2026 – February 2027)

- **RFP Issued:** May 6, 2026
- **Proposals Due:** June 5, 2026
- **Project Kickoff:** July 15, 2026
- **Strategic Planning Retreats (in person):**
  - **Board and Senior Staff on August 21**
  - Senior Staff only following the board exercise
  - All staff TBD, likely September 2026
  - Wrap up Senior Staff January 2027 (could be remote)
- **Final Plan Delivery (possibly hybrid):** February 2027, board meeting TBD early-mid February

## Qualifications

The ideal consulting team will demonstrate:

- Proven experience in strategic planning with CDFIs, nonprofit organizations, and/or similar financial institutions
- Proven track record of collaborating with executive-level staff and board members to develop comprehensive, multi-year strategic plans with specific, measurable objectives and clear implementation timelines
- Expertise in community development finance, including CDFIs, impact investing, and nonprofits
- Strong experience in supporting organizations to grow their impact through new ideas or out of the box thinking
- Experience conducting environmental scans, SWOT analyses, and/or organizational assessments
- Ability to develop actionable, measurable strategic plans

Consultants will be engaged to complete specified tasks upon receipt of satisfactory deliverables. Fees for each task or deliverable should include preparation, research,

participation in meetings, edits of drafts if requested, and any ancillary tasks necessary for the completion of the deliverables as outlined in the Scope of Work.

## **Submission Instructions**

All proposals should be submitted electronically as a single PDF document by June 5, 2026 at 5:00 PM PST. Prior to May 26 Housing Trust will open up a calendar for calls to address clarifying questions. Interested parties should email [rfp@housingtrustsv.org](mailto:rfp@housingtrustsv.org) to get on the list for Q&A calls prior to June 1.

Proposals must include:

- **Cover Letter:** Summary of interest and qualifications
- **Technical Approach:** Description of proposed methodology and work plan
- **Experience & Qualifications:** Relevant experience, team members, and resumes
- **Project Timeline and details:** Estimated duration for each phase
- **Budget Proposal:** Detailed cost estimate including consulting fees and expenses
- **References:** Contact information for three relevant clients
- **Sample Work:** At least one example of a previously completed strategic plan

Please direct questions and submit proposal to [rfp@housingtrustsv.org](mailto:rfp@housingtrustsv.org) to ensure it is addressed in a timely manner.