

# Cooperative Federal

Syracuse's community development credit union



## REQUEST FOR PROPOSALS

Date Posted: 8/18/2022

Application Deadline: 8/29/2022

Project Description: HUD Housing Counseling Processes & Procedures

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### Executive Summary

Cooperative Federal seeks a qualified consultant to review, improve, and document processes and procedures for our HUD Housing Counseling Program.

### Qualifications

- Minimum of 3-5 years' experience as a professional Housing Counselor at a HUD Housing Counseling (HUD HC) agency or affiliate, including knowledge of HUD program administration and compliance requirements.
- Minimum of 3-5 years' experience in nonprofit program development and process design; command of strategies that consider both client experience and operational workflows.
- Formal training and/or certification from nationally recognized agencies such as Neighborworks Center for Homeownership Education & Counseling, RCAC, and US HUD.
- Familiarity with Client Management Systems (CMS), such as Outcome Tracker or other software.
- Ability to play an active leadership role and collaborate with program staff.
- First-hand experience working with diverse populations, especially communities with low household income, communities of color, immigrants/refugees, and Limited English Proficient populations; ability to apply that experience to the scope of work.
- Commitment to the mission and values of Cooperative Federal: financial inclusion, economic justice, and social and racial equity.

### Scope of Work

- Review, observe, and discuss Coop Fed's current HUD HC program processes and procedures.
- Propose improvements to intake process, client feedback collection, case management and quality assurance; implement proposed changes, collaborating with staff as needed.
- Document procedures for use in program management and staff training/onboarding.
- Audit a sample set of case files.
- The initial contract can potentially be extended to include quarterly or semi-annual support with program compliance and quality assurance (optional).



Syracuse Cooperative Federal Credit Union • Finance for the People since 1982  
Ph: (315) 471-1116 Fax: (315) 476-0567 info@coopfed.org www.coopfed.org



**Westcott Street Office**  
& Mailing Address  
723 Westcott Street  
Syracuse, NY 13210

**South Avenue Office**  
at SW Community Center  
401 South Avenue  
Syracuse, NY 13204

**North Salina Street Office**  
& Administrative Headquarters  
800 North Salina Street  
Syracuse, NY 13208

**Burt Street Office**  
at Syracuse Housing Authority  
516 Burt Street  
Syracuse, NY 13202

**Location**

Hybrid remote & onsite in Syracuse, NY. We are seeking a consultant who will primarily work remotely but is available to attend meetings in person as needed.

**Application Requirements**

Please submit a written proposal (1-2 pages recommended) outlining the following information:

- Experience and qualifications, specifically addressing RFP requirements
- Cost quote to fulfill the scope of services
- Available start date

Attachment:

Professional resumé

Submit to:

Meagan Weatherby

Development & Communication Manager

meaganweatherby@coopfed.org

**Questions**

Inquiries can be directed to the submission contact listed above, or by phone: 315 473 0206.



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