



Learning. Lending. Building.

www.TrellisAZ.org

Date: October 19, 2020

REQUEST FOR PROPOSALS

Trellis is an Arizona, non-profit 501(C) (3) organization that has been serving the community since 1975 providing housing counseling and education, real estate development and mortgage lending to increase homeownership opportunities. Trellis's mission is to make stable homes and communities possible by educating, building and lending. Trellis has helped hard-working families realize the dream of financially-stable homeownership for 45 years.

From 1975 to 2019, Trellis has helped create 3,713 families purchase their first home; built or rehabbed 318 homes; educated and/or counseled 44,303 families or individuals in financial management and/or how to buy a home; originated or facilitated more than 2,100 mortgage loans totaling \$159MM. During the great Recession, Trellis saved 4,800 struggling homeowners from foreclosure. Operationally, we received a rating of "Exemplary", the highest possible rating by NeighborWorks America ®.

Trellis is seeking a firm or individual-consultant with experience working with Community Development Financial Institutions (CDFIs), non-profits to help assesses and evaluate Trellis' lending models and growth potential to meet the organizations strategic goals.

Scope of Work: Evaluate Trellis' lending history, current lending models and potential growth strategies, including capital source options.

Include at least two references of similar/related work. Include cost estimates for scope of work and timeline.

Submit proposals to: Patricia Garcia Duarte, President & CEO; Phone: 602-424-5340 by email pgarciaduarte@trellisaz.org, **SUBJECT LINE: Lending Assessment 2020** by 12:00 pm Mountain Standard Time Zone on November 6, 2020