

## ISSUED BY

Black Cultural Zone CDC

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## REQUEST FOR PROPOSAL

Issued: Spring 2026  
Deadline: Rolling Review

# RE: Specialized Finance & Capital Stack Subject Matter Expert (SME)

## 1. PROJECT OVERVIEW

The **Centers of Excellence Network Foundation** is seeking an elite **Specialized Finance & Capital Stack Subject Matter Expert (SME)** to join our **Strategic Collaboration Ecosystem**. This role is pivotal in navigating the complex financial architecture required to fund the **Black Cultural Zone CDC** (our operational Strategic Management Services hub) and its multi-billion-dollar long-term real estate goals.

The Foundation serves as the **System Architect**, providing strategic oversight and fiduciary control, while the **Black Cultural Zone CDC** serves as the operational backbone for subsidiaries focused on Real Estate (REDPM), Culture (CPHI), Land Stewardship (Liberated Land Trust), and Economic Empowerment.

**Note on Collaboration:** This role is distinct from and complementary to our Capital Campaign fundraising functions. While the Specialized Finance SME will communicate with Campaign consultants to ensure alignment, this role focuses specifically on the technical "Capital Stack" (Tax Credits, Debt, PRIs) rather than donor cultivation.

## 2. THE STRATEGY: "SIRE"

We are moving from reactive funding to **Strategic Institutionalization and Resource Expansion (SIRE)**. We require an SME who can structure sophisticated impact finance and "Place Keeping" initiatives to ensure permanent community control and institutional-grade financial sustainability.

## 3. SCOPE OF WORK

AREA OF FOCUS	DESCRIPTION
FINANCIAL ARCHITECTURE	Structure and source funding involving PRIs, New Markets Tax Credits (NMTC), LIHTC, and Land-Bank opportunities.
ANCHOR COMMITMENTS	Secure non-public commitments from Institutional Investors and Agency Leads for specific project phases.
STRATEGIC BRIDGE	Align technical revenue streams (Debt/Equity) with overarching milestones to ensure project feasibility.
FIDUCIARY ADVISORY	Provide the CEO and Board with high-level briefings on debt-service coverage and long-term financial health.
INVESTMENT DOCS	Provide "Strategic Intelligence Briefs" to the Production Engine to develop Investment Memorandums and technical Pro-Formas.

## \$2.0B+ CAPITAL CAMPAIGN

- **The Vision:** Mobilizing two billion dollars in capital to anchor Black arts, culture, and economics through a high-fidelity governance model.
- **The Blueprint:** A strategic geographic intervention (the 60x60 Block Plan) designed to ensure permanent, non-displaceable community power.
- **The Governance:** The Foundation (System Architect) provides fiduciary oversight for specialized subsidiaries in Real Estate, Land Stewardship, and Culture.

## THE 6-YEAR DATA BANK

- **Proven Impact:** Immediate access to 72 months of successful grant metrics, project pro-formas, and community engagement data.
- **The Engine:** A fully integrated tech stack (**Virtuous, ClickUp, Momentum**) containing thousands of clean donor and volunteer records.
- **The Vault:** Signature initiative templates and "Case for Support" assets ready for rapid remixing and deployment.

## 4. THE SUPPORT INFRASTRUCTURE

The selected SME will serve as a lead "Integrator" within our professional workflow:

- **Tech Stack:** Proficiency required in **ClickUp**, **Smartsheets**, **Virtuous CRM**, and financial modeling software.
- **Production Engine:** Support from a dedicated **Proposal Architect** and **Packaging Specialist** to create Investment Memorandums and technical briefs.
- **Data Lake:** Full access to **6 years** of real estate pro-formas, historical impact data, and existing capital stack structures.

## 5. COMPENSATION: REPLENISHABLE RETAINER

We utilize a **Deliverable-Based Draw-Down Retainer** model to ensure consistent partnership and accountability.

- **Monthly Retainer Balance:** \$3,000+.
- **Mechanism:** Fees are "drawn down" only upon successful completion of specific deliverables (e.g., cost per Financial Model finalized or Investment Memorandum completed).
- **Replenishment:** The Foundation replenishes the account to the agreed base level monthly upon invoice approval.

## 6. SUBMISSION REQUIREMENTS

Proposals must be **no more than five (5) pages** in PDF format and include:

1. **Financial Track Record:** Overview of experience structuring complex community development finance (Tax Credits, PRIs, etc.).
2. **The "Anchor" Case Study:** One specific example of how you structured a complex capital stack for a mission-driven real estate project.
3. **Technical Workflow:** Describe how you utilize **ClickUp** or **Smartsheets** to manage multi-stakeholder project timelines.
4. **Mock Fee Proposal:** List of service items and "draw-down" rates fitting the monthly range.
5. **The Strategic Qualifier:** (300 words max) Describe how you would utilize our **6-year Data Bank** to structure a "Private Invitation" for a **Program-Related Investment (PRI)** from a major Foundation.

**Submit to:** [grants@blackculturalzone.org](mailto:grants@blackculturalzone.org)



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**"Deep Roots. Bright Future."**

60×60 Block Plan · Liberation Park · East Oakland  
RFP Document · Spring 2026