

RIHousing

Request for Proposals Communications Services

INTRODUCTION

Through this Request for Proposals (“RFP”), Rhode Island Housing and Mortgage Finance Corporation (“RIHousing”) seeks to create a list of qualified vendors that can be retained on an as needed basis to provide one or more of the below services:

- A. Public and Stakeholder Engagement
- B. Focus Groups, Surveys, In-depth Interviews, & Facilitated Meetings
- C. Industry/Market Analyses/Business Planning
- D. Marketing/Advertising
- E. Graphic Design
- F. Video/Audio Recording and Production
- G. Strategic Communications Advice and Counsel

These services are set forth more fully in the Scope of Work Attachments A through G, attached hereto.

Selected vendors will be placed on a Bidder List for a term of three (3) years, with two (2) one-year extensions at the sole option of RIHousing. As the projects have not yet been identified, vendors selected to participate in the Bidder List will enter into an “on-call” style agreement. There is no guarantee of any level spending activity to a vendor or vendors selected for this Bidder List.

Vendors may bid on one, multiple, or all services listed in this Bidder List.

INSTRUCTIONS

Electronic submissions of the proposal(s) should be submitted to **Christine Hunsinger, Assistant Deputy Director for Policy and Research** at chunsinger@rihousing.com. Proposals should be concise and include all attachments and work samples. *Note:* Please submit only project summaries and/or tear sheets (one-pagers) as samples of your work; do not submit copies of entire reports or projects.

Proposals must be received no later than 5:00 p.m. EST on Friday, August 10, 2018.

Respondents are advised that all submissions (including those not selected for engagement) may be made available to the public upon request after completion of the process and award of a contract(s).

BACKGROUND

RIHousing is a self-supporting public corporation created in 1973 to address the housing needs of low- and moderate-income Rhode Islanders. Its statutory purpose is to encourage the investment of private capital, to stimulate the construction and rehabilitation of housing for low and moderate-income Rhode Islanders, to provide construction and mortgage loans, and to make provision for the purchase of mortgage loans and otherwise as is necessary to accomplish its purposes.

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SCOPE OF WORK

Please see the Scope of Work provided at Attachments A-G. **NOTE: When responding to any of the Services detailed in the Scope of Work, proposals should demonstrate firm experience as well as proposed approach and project cost examples for each project.**

INTELLECTUAL PROPERTY RIGHTS

To the extent permitted by law, all works created by the successful bidder(s) under this RFP shall be the exclusive property of RIHousing and shall be deemed “work made for hire” under the United States Copyright Act. The successful bidder agrees to execute any documents reasonably required by RIHousing to evidence RIHousing’s exclusive ownership of the work products, and all intellectual property rights therein.

ITEMS TO BE INCLUDED WITH YOUR PROPOSAL

A. General Firm Information

1. Provide a brief description of your firm, including but not limited to the following:
 - a. Name of the principal(s) of the firm.
 - b. Name, telephone number and email address of a representative of the firm authorized to discuss your proposal.
 - c. Address of all offices of the firm.
 - d. Number of employees of the firm.

B. Proposed Services

1. Please indicate by service name and letter for which services your firm is offering proposals.

C. Experience and Resources

1. Describe your firm and its capabilities. In particular, support your capacity to perform the Scope of Work.
2. Indicate which principals and associates from your firm would be involved in providing services to RIHousing. Provide appropriate background information for each such person and identify his or her responsibilities.
3. Submit work samples relevant to each service.
4. Provide a detailed list of references, including a contact name and telephone number for organizations or businesses for whom you have performed similar work.

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5. Identify any conflict of interest that may arise as a result of business activities or ventures by your firm and associates of your firm, employees, or subcontractors as a result of any individual's status as a member of the board of directors of any organization likely to interact with RIHousing.
6. Identify any material litigation, administrative proceedings or investigations in which your firm is currently involved. Identify any material litigation, administrative proceedings or investigations, to which your firm or any of its principals, partners, associates, subcontractors or support staff was a party, that has been settled within the past two (2) years.
7. Describe how your firm will handle actual and or potential conflicts of interest.
8. Identify individuals in your firm with multi-lingual skills, who are available to assist with communication in languages other than English. Please identify the language(s).

D. Fee Structure

The cost of services is one of the factors that will be considered in selecting vendors for the Bidder List. While the specific services required will vary by project and will be paid based on a scope of work defined by RIHousing and pricing negotiated between the corporation and the vendor, we are requesting information that will allow RIHousing to evaluate the reasonableness of your fees.

For each service you are submitting for, please use the corresponding sample projects contained in the attachments and provide:

1. A cost proposal for providing the Scope of Work in the corresponding attachment.
2. Provide an itemized breakdown of billing rates and hourly costs, list of key personnel and their hourly rates, reimbursable expenses, etc. for any services that you feel are relevant that may be requested in addition to the services previously described.
3. Please provide any other fee information applicable to the engagement that has not been previously covered that you wish to bring to the attention of RIHousing.

E. Miscellaneous

1. RIHousing encourages the participation of persons of color, women, persons with disabilities and members of other federally and State-protected classes. Describe your firm's affirmative action program and activities. Include the number and percentage of members of federally and State-protected classes who are either principals or senior managers in your firm, the number and percentage of members of federally and State-protected classes in your firm who will work on RIHousing's engagement and, if

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applicable, a copy of your Minority- or Women-Owned Business Enterprise state certification.

2. Discuss any topics not covered in this Request for Proposals that you would like to bring to RIHousing's attention.

F. Certifications

1. RIHousing insists upon full compliance with Chapter 27 of Title 17 of the Rhode Island General Laws, Reporting of Political Contributions by State Vendors. This law requires State Vendors entering into contracts to provide services to an agency such as RIHousing, for the aggregate sum of \$5,000 or more, to file an affidavit with the State Board of Elections concerning reportable political contributions. The affidavit must state whether the State Vendor (and any related parties as defined in the law) has, within 24 months preceding the date of the contract, contributed an aggregate amount in excess of \$250 within a calendar year to any general officer, any candidate for general office, or any political party.
2. Does any Rhode Island "Major State Decision-maker," as defined below, or the spouse or dependent child of such person, hold (i) a ten percent or greater equity interest, or (ii) a Five Thousand Dollar or greater cash interest in this business?

For purposes of this question, "Major State Decision-maker" means:

- (i) All general officers; and all executive or administrative head or heads of any state executive agency enumerated in § 42-6-1 as well as the executive or administrative head or heads of state quasi-public corporations, whether appointed or serving as an employee. The phrase "executive or administrative head or heads" shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel or chief of staff;
- (ii) All members of the general assembly and the executive or administrative head or heads of a state legislative agency, whether appointed or serving as an employee. The phrase "executive or administrative head or heads" shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel or chief of staff;
- (ii) All members of the state judiciary and all state magistrates and the executive or administrative head or heads of a state judicial agency, whether appointed or serving as an employee. The phrase "executive or administrative head or heads" shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel, chief of staff or state court administrator.

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If your answer is “Yes,” please identify the Major State Decision-maker, specify the nature of their ownership interest, and provide a copy of the annual financial disclosure required to be filed with the Rhode Island Ethics Commission pursuant to R.I.G.L. §§36-14-16, 17 and 18.

3. In the course of providing goods or services to RIHousing, the selected respondent may receive certain personal information specific to RIHousing customer(s) including, without limitation, customer names and addresses, telephone numbers, email addresses, dates of birth, loan numbers, account numbers, social security numbers, driver’s license or identification card numbers, employment and income information, photographic likenesses, tax returns, or other personal or financial information (hereinafter collectively referred to as the “Personal Information”). The maintenance of the Personal Information in strict confidence and the confinement of its use to RIHousing are of vital importance to RIHousing. Please include a letter from your president, chairman or CEO certifying that, in the event your firm is selected:
 - (i) any Personal Information disclosed to your firm by RIHousing or which your firm acquires as a result of its services hereunder will be regarded by your firm as confidential, and shall not be copied or disclosed to any third party, unless RIHousing has given its prior written consent thereto; and
 - (ii) your firm agrees to take all reasonable measures to (a) ensure the security and confidentiality of the Personal Information, (b) protect against any anticipated threats or hazards to the security or integrity of the Personal Information, and (c) maintain reasonable security procedures and practices appropriate to your firm’s size, the nature of the Personal Information, and the purpose for which the Personal Information was collected in order to protect the Personal Information from unauthorized access, use, modification, destruction or disclosure; and
 - (iii) when discarding the Personal Information, destroying it in a commercially reasonable manner such that no third party can view or recreate the information, electronically or otherwise.

These provisions, which implement the requirements of the Rhode Island Identity Theft Protection Act, R.I.G.L. § 11-49.2 et seq., will also be incorporated into the final contract with the selected respondent(s).

4. Please include a letter from your president, chairman or CEO certifying that (i) no member of your firm has made inquiries or contacts with respect to this Request for Proposals other than in an email or written communication to Christine Hunsinger, chunsinger@rihousing.com seeking clarification on the Scope of Work set forth in this proposal, from the date of this RFP through the date of your proposal, (ii) no member of your firm will make any such inquiry or contact until after August 10, 2018, (iii) all information in your proposal is true and correct to the best of her/his knowledge, (iv) no

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member of your firm gave anything of monetary value or promise of future employment to a RIHousing employee or Commissioner, or a relative of the same, based on any understanding that such person's action or judgment will be influenced and (v) your firm is in full compliance with Chapter 27 of Title 17 of the Rhode Island General Laws, Reporting of Political Contributions by State Vendors.

EVALUATION AND SELECTION

A selection committee consisting of RIHousing employees (the "Committee") will review all proposals and make a determination based on the following factors:

- Company Background, Profile and Operations
 - Company history, profile
 - Services provided, track record of success
 - Experience with similar organizations and RIHousing business lines
- Company Resources, Expertise, and Experience
 - Previous experience and success in projects of similar scope, nature, and timelines
 - Quality of work samples and creative concepts developed and implemented
 - Foreign language capabilities of the firm (*for Public and Stakeholder Engagement services only*)
- Proposed Workplan and Budget
 - Proposal innovation, understanding of objectives, key requirements
 - Quality, capability, and capacity of proposed team
 - Response to RIHousing's requirements regarding intellectual property rights
- Company Remuneration
 - Fees, fee structure, and value for service

RIHousing may invite one or more finalists to make presentations.

RFP Schedule

RFP posted	Friday, July 6, 2018
RFP deadline	Friday, August 10, 2018
Interviews w/selected candidates*	Second week of September 2018
Notifications to finalists	End of September 2018

*Interviews with selected candidates will be conducted in-person, via phone, and/or Skype.

In its sole discretion, RIHousing may negotiate with one or more firms who have submitted qualifications to submit more detailed proposals on specific projects as they arise.

By this Request for Proposals, RIHousing has not committed itself to undertake the work set forth. RIHousing reserves the right to reject any and all proposals, to rebid the original or amended scope of services and to enter into negotiations with one or more respondents. RIHousing reserves the right to make those decisions after receipt of responses. RIHousing's decision on these matters is final.

For additional information contact: Christine Hunsinger, chunsinger@rihousing.com.

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SCOPE OF WORK

Attachment A

SERVICES

Public and Stakeholder Engagement

RIHousing believes it will have need to conduct a variety of public engagement activities over the next few years. These activities will likely vary in purpose and scope.

Some typical examples of audiences and purposes are:

- Soliciting input from residents, community members, and other stakeholders around development/redevelopment of specific housing projects or programs;
- Soliciting input from stakeholders as part of the state's requirements for federal Fair Housing and Consolidated Plans; and
- Soliciting input from the general public around a broad set of housing issues.

Firms should demonstrate experience in the following areas:

- Community outreach, consensus building, strategic planning, visioning and visualizing;
- Involving a diverse set of audiences in interesting, creative ways that foster dialogue and meaningful input;
- Meeting facilitation and logistics;
- Using cutting-edge engagement strategies;
- Engaging difficult to reach and underrepresented populations; and
- Successfully conducting effective public engagement around controversial issues.

Respondents should assume that they will be responsible for all meeting logistics (scheduling, meeting preparation including any audio-visual equipment and copying of handouts, and other details), meeting facilitation, and that they will work with RIHousing staff and consultants on developing meeting agendas.

Selected vendor(s) will be responsible for identification of proposed approaches and methods used, as well as post engagement reporting, preparation of written summaries, and analysis/reporting.

Firms should provide project approach and average project cost examples for:

- Scheduling, coordinating and conducting three (3) public visioning meetings to solicit feedback from stakeholders;
- Conducting approximately ten (10) targeted interviews with key stakeholders;
- Drafting a report summarizing all meeting minutes, interview notes, responses, and recommendations. The report should summarize a feasible plan for action.

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SCOPE OF WORK

Attachment B

SERVICES

Focus Groups, Surveys, In-depth Interviews, Facilitated Meetings

RIHousing has several distinct lines of business including Loan Origination, Loan Servicing, Multifamily Development, Rental Assistance, Asset Management, and more. Occasionally, RIHousing uses focus groups, surveys, a series of in-depth interviews, and/or facilitated meetings to gather data on different aspects of its business.

Some typical examples of audience and purpose are:

- Realtors/Lenders—understanding how our mortgage lending processes are viewed and what can be done to improve them;
- Developers—understanding how our design and construction processes are viewed and how the process could be improved;
- Landlords—understanding what obstacles exist for landlords to rent to tenants who use a Section 8 Voucher.

A variety of services may be provided by the Vendor related to the provision of focus groups, including recruitment; development of screening tools, moderator’s guides, and exit tools; facilitation; logistics; report writing; and results analysis.

Potential survey techniques may include intercept and telephone surveys, newspaper polls, and others. In addition, the Vendor may be expected to conduct “effectiveness measurement” to establish a baseline and benchmarks to gauge message effectiveness through a variety of metrics and tracking.

These services may be requested as individual, standalone services, or they may be requested as part of a comprehensive campaign. The services required will depend on the scope of work for each program or project. Selected vendors will have demonstrated experience in producing and conducting statistically reliable polling surveys. Vendor(s) will be responsible for identification of proposed approaches and methods used, as well as post engagement reporting, preparation of written summaries, and analysis.

Provide project approach and average project cost examples for:

- Telephone survey of 400 with a +/- 5 margin of error wherein the Vendor generates the sample;
- Web-based survey of 200 wherein the Vendor generates the sample;
- Twenty (20), one-hour long in-depth interviews;
- Report summarizing responses from all surveys/interviews noted above.

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SCOPE OF WORK

Attachment C

SERVICES

Industry/Market Analyses/Business Planning

RIHousing has several distinct lines of business including Loan Origination, Loan Servicing, Multifamily Development, Rental Assistance, Asset Management, and more. RIHousing believes it will have need to conduct various analyses regarding several of its lines of business. Industry/Market Analysis efforts will assist the agency to gain a better understanding of the state and region's economy, customers, and business development opportunities. We seek data and analyses that can help us strategically expand business lines as well as to help us assist our existing businesses in reaching more customers.

Typical examples of expected research are:

- Examine the market, its size, growth and identify any market opportunities;
- Examine competition in the market, including any competitive advantages;
- Analysis of the industry, the marketplace, and potential clientele/customers;
- SWOT analysis (strengths, weaknesses, opportunities and threats);
- Recommend the most appropriate forms of promotion and sales channels;
- Evaluate the current and future demand for products and services through a range of efforts and methodologies, including but not limited to conversations with private stakeholders; homebuyers; existing customers; business/industry groups and professional organizations; interest groups and local businesses.

Selected vendors should have the capacity and experience to:

- Provide a snapshot of the state's economy, identifying areas for growth, untapped customers/business partners, and strategies for reaching them;
- Identify opportunities to pursue a broader statewide approach to program development;
- Using the results of the above analysis, develop a comprehensive written report that presents opportunities and strategies for expansion and growth of various business lines. The analysis must consider a wide continuum of business models and highlight associated costs for expansion, maintenance, and operations. It must propose an action plan which includes best management practices and procedures to protect assets.
- Develop proposed models, strategies and action plans that are financially sustainable, providing for long-term solvency and security.

Past relevant experience in working with similar clients and demonstrated success in advancing organizational and business goals are required.

Provide project approach and average project cost examples for:

- Research and evaluation to estimate the size of the Rhode Island homebuying market and determine if the industry is stable, growing, or volatile in the current economic climate.
- Report detailing the view of the market, its size, and segmentation.

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SCOPE OF WORK

Attachment D

SERVICES

Marketing/Advertising

RIHousing has several distinct lines of business including Loan Origination, Loan Servicing, Multifamily Development, Rental Assistance, Asset Management, and more. RIHousing believes it will have need to market and advertise various programs and services in support of business goals.

Typical examples of Marketing and Advertising services include:

- Execution of creative marketing/advertising campaigns, including the promotion of programs through:
 - Websites and social media platforms
 - Traditional marketing platforms (i.e. TV, radio, trade publications, traditional media, direct marketing, etc.)
 - Other emerging and commonly deployed media
- Develop a three-year promotional and marketing strategy, particularly in support of our Homeownership program;
- Guidance and assistance in the creation of a visual brand identity for the agency, consistent across its various departments and functions;
- Provide guidance and expertise to staff on creating and maintaining brand standards;
- Assure that marketing/advertising promotes equal opportunity, fairness and fair housing goals by reaching the many diverse populations within our state including those that may be hard to reach but could most benefit from our programs;
- Share and/or conduct market research and expertise to ensure effective outreach to target audiences.

Selected vendors will be expected to:

- Develop and propose a system of measurable results and outcomes:
 - Provide regular reports to determine if efforts are achieving agency goals
 - Monitor and provide analytic data to ensure the effectiveness of advertising and media expenditures
- Recommend advertising channels across print, digital, social, broadcast and radio, based on research and agency goals:
 - Negotiate fees with selected publications and media outlets;
 - Place ads with media outlets as needed
- Respondents should have working knowledge, or experience with the following traditional and non-traditional media platforms: television, radio, outdoor advertising, Google AdWords, Pandora radio, print publications, YouTube video advertising, and social media advertising.

Provide project approach and average project cost examples for:

- Spring homebuying ad campaign – including discovery, interviews, copy writing, and design; assuming media buys/placement and photography are extra.

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SCOPE OF WORK

Attachment E

SERVICES

Graphic Design

RIHousing has several distinct lines of business including Loan Origination, Loan Servicing, Multifamily Development, Rental Assistance, Asset Management, and more. RIHousing believes it will have need for graphic design services to support advertising and public information objectives.

Typical examples of Graphic Design services include:

- Develop visual themes and branding that can be applied to a wide variety of media;
- Work with agency staff and other contractors to collaboratively develop creative approaches to publications and other outreach efforts;
- Develop graphic elements that support a cohesive visual theme for the agency and that can be integrated into the website, social media and other non-print uses;
- Design and layout various print publications, including the agency's Annual Report and other reports, publications, and printed materials identified by RIHousing;
- Promotional and marketing materials for RIHousing in general and for specific divisions and programs within the agency;
- Coordinate printing by setting specifications, soliciting bids from print firms, and when appropriate, act as the point of contact with print vendors;
- Develop timelines for preparation and production of the above pieces;
- Update the agency's graphic and brand standards;
- Design and execute assigned graphic production processes on time, and at or below budget;
- Submit original files of all graphic design elements to RIHousing upon completion.

Firms should demonstrate experience in the following areas:

- **Graphic Design/Layout:** experience managing and coordinating graphic design projects from concept through completion; working closely with clients to create vision, conceive designs, and consistently meet deadlines and requirements; coordinate freelance designers, consultants and vendors to meet all project requirements; extensive experience in multimedia, marketing and print design.
- **Production:** managing all operational, strategic, financial, quote/bid, staffing, and administrative functions relating to design services; coordination with vendors, printers and others.

Provide project approach and average project cost examples for:

- One, four-panel, four-color brochure – including discovery, interviews, copy writing and design; exclusive of printing and photography;
- Annual report comparable to [RIHousing's 2017 annual report](#) – including discovery, interviews, copy writing and design; exclusive of printing and photography.

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SCOPE OF WORK

Attachment F

SERVICES

Video/Audio Recording and Production

RIHousing has several distinct lines of business including Loan Origination, Loan Servicing, Multifamily Development, Rental Assistance, Asset Management, and more. RIHousing believes it will have need for video and audio production services to support outreach and public information objectives.

The vendor must have the necessary expertise to provide the following services:

- Pre-production planning: Scriptwriting/content development; Storyboard creation; Location scouting; Casting/Sourcing talent; Production management; Creative direction.
- Production: Creative direction of video crews, actors and non-professional talent; Set design and art direction; HD shooting; Voiceover and ADR recording.
- Post-production: Music selection, sound editing and mixing; Closed captioning-capability; Video editing, including graphics and music; Utilize .mp4 and .mov video formats and 1080 p high definition resolution; Upload unedited raw footage with metadata tags to a designated storage area; Work with staff to review rough cuts, develop the sequence of video clips, and identify gaps in footage for additional filming; Edit to final production professional grade copy with attention to detail on all video, graphic, and sound elements; Upload final edited version to the video hosting site that RIHousing specifies; and Provide unedited raw footage and rough cuts of all filming sessions for RIHousing to save, review and otherwise use without limitation

Firms should have expertise and knowledge of video/audio production and ensure fidelity to the established branding and design throughout the entire video production.

Provide project approach and average project cost examples for:

- Full-Day video shoot with raw footage
- Half-day video shoot with raw footage
- Cost for three (3), two (2)-minute videos, edited

If bidding on audio services, please provide cost examples for the following:

- 10-episode podcast (each episode 20-30 minutes); includes content development, recording, editing; not including cost of media buys/placement to push engagement

Note: RIHousing will retain proprietary interest in all customized materials, graphics, as well as the look and feel of the videos/audio recordings created by selected vendor(s). In developing the videos, the vendor will not infringe or violate the copyright and other intellectual property rights of third parties. The vendor is responsible for securing various rights, licenses, clearances and other permissions related to works, graphics or other copyrighted materials to be used or otherwise incorporated in the website.

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SCOPE OF WORK

Attachment G

SERVICES

Strategic Communications Advice and Counsel

RIHousing has several distinct lines of business including Loan Origination, Loan Servicing, Multifamily Development, Rental Assistance, Asset Management, and more. To meet the changing landscape and needs of Rhode Islanders, RIHousing believes it will have need for Strategic Communications Services.

Typical examples of services include:

- Develop communications content and general guidance on message strategies and external communications;
- Identify market opportunities, messaging, voice, thought leadership strategy or overall communications approach;
- Conduct a communications Audit/Assessment of current and proposed communications efforts;
- Create strategic communications plan tied directly to business goals, and [develop strategies](#) and tactics to most effectively and efficiently reach those goals;
- Provide insight, [analytics](#) and strategic thinking to help streamline outreach efforts toward tactics and approaches that produce direct business impact;
- Identify areas for improvement and opportunity;
- Assist in one-on-one meetings with stakeholders, stakeholder relations, public relations, and complex crisis management.

Firms should have experience in:

- Strategic communications work;
- Familiarity with effective models and practices for branding, strategic communications and publicity activities.

Provide project approach and both hourly rate(s) and proposed number of hours per month.