

RIHousing

Request for Proposals Communications Services: Public & Stakeholder Engagement

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 the following service: Public and Stakeholder Engagement.

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.

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) or hyperlinks to full reports or projects. Do not attach copies of entire reports or projects.

Proposals must be received no later than 5:00 p.m. EST on Friday, October 12, 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.

SCOPE OF WORK

Please see the Scope of Work provided at Attachment A.

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.

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ITEMS TO BE INCLUDED WITH YOUR PROPOSAL

When responding to the Services detailed in the Scope of Work, proposals should demonstrate firm experience as well as proposed approach and project cost examples. Please note that failure to provide any information requested in this RFP may cause your submission not to be scored.

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. 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 relevant work samples.
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.
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. If none, please provide a statement to such effect.
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. If none, please provide a statement to such effect.
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).

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C. 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.

Please use the corresponding sample project contained in the Scope of Work and provide:

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

D. 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 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.

E. 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,

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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. Please acknowledge your understanding of this in your RFP response.

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.

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. If your answer is “No,” please provide a statement to such effect.

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

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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 October 12, 2018, (iii) all information in your proposal is true and correct to the best of her/his knowledge, (iv) no 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

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- 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, engagement activities and outcomes
 - Foreign language capabilities of the firm
- Proposed Workplan and Budget
 - Proposal innovation, understanding of objectives, key requirements
 - Quality, capability, and capacity of proposed team
- Company Remuneration
 - Fees, fee structure, and value for service

RIHousing may invite one or more finalists to make presentations.

RFP Schedule

RFP posted	September 20, 2018
RFP deadline	5:00 pm. EST, Friday, October 12, 2018
Interviews w/selected candidates*	Late October 2018
Notifications to finalists	End of November 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, scope, and duration.

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.

Past relevant experience in working with similar clients and demonstrated success in engagement services are required.