



**REQUEST FOR PROPOSALS**  
**On-Call Data and Communication Services**

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**Posting Date: September 16, 2024**

**Response Submission Deadline: 3:00pm EST on Friday, October 4, 2024**

**DEADLINE EXTENDED FOR SERVICES F, G and J: 3:00 pm EST on Friday, November 15, 2024**

**NOTE TO RESPONDENTS:**

Please be advised that **all** submissions (including those not selected for engagement) may be made available to the public on request pursuant to the Rhode Island Access to Public Records Act, Chapter 2 of Title 38 of the Rhode Island General Laws (the “APRA”) upon award of a contract(s). As a result, respondents are advised not to include information that they deem proprietary or confidential or that constitutes a trade secret.

**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:

- B. Marketing/Advertising/Media Buying
- C. Creative Services
- D. Photography
- E. Report Writing
- F. **Production of State or Federal Required Plans or Reports - DEADLINE EXTENDED**
- G. **Grant Writing - DEADLINE EXTENDED**
- H. Public and Stakeholder Engagement
- I. Focus Groups, Surveys, In-Depth Interviews, & Facilitated Meetings
- J. **Industry/Market Analysis/Business Planning - DEADLINE EXTENDED**
- K. Strategic Communications Advice and Counsel
- L. Website Hosting, Maintenance and Support

These services are set forth more fully in the Scope of Work Attachments B through L, 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 of spending activity to a vendor or vendors selected for this Bidder List.



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**Vendors may bid on one, multiple, or all services listed in this RFP.**

## **INSTRUCTIONS**

Proposals must be submitted via email to: **HeeJin Kim, Manager of Communications and Brand Strategy**, at [hkim@rihousing.com](mailto:hkim@rihousing.com) no later than the response submission deadline set forth above.

**Proposals that are not received by the response submission deadline or that do not adhere to the submission instructions described herein shall not be accepted or considered by RIHousing.**

Proposals should be concise and adhere to the word count applicable to each section of this Request for Proposals (“RFP”). Proposals should be presented on business letterhead and include all attachments, certifications (including the Submissions Certification in Attachment A), and work samples (as applicable).

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. Please note that failure to provide any information, certification, or document requested in this RFP may cause your submission not to be reviewed or considered by RIHousing.

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).

**Respondents can respond to one or multiple Scopes of Work; respondents must clearly identify which services they are proposing to provide and detail their capacity and costs to provide those services.** Please indicate by service name and letter for which services your firm is offering proposals.

RIHousing may invite one or more finalists to make presentations, including demonstrations of requested products, if applicable.

Updates, amendments and Q&As related to this Request for Proposals may be posted from time to time at: [RFPs & RFQs | RIHousing](#).



**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.

**SCOPE OF WORK**

Please see the Scopes of Work provided at Scope of Work Attachments B-L.

**ITEMS TO BE INCLUDED WITH YOUR PROPOSAL**

**SUBMISSION  
CHECK LIST**

**Section A: General Firm Information (Total word limit: 500 words)**

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, business telephone number and business email address of a representative of the firm authorized to discuss your proposal.
  - c. Locations of all offices of the firm.
  - d. Number of employees of the firm.

**RIHousing requests that the contact information provided in response to this subsection (1) be strictly limited to business addresses, telephone numbers, and email addresses to protect any personal information from being made available to the public pursuant to APRA.**

**Section B: Experience and Resources (Total word limit: 3500 words)**

1. Describe your firm and its capabilities. In particular, support your capacity to perform the outlined Scope of Work Attachments B-L (as applicable).

2. Indicate which principals and associates from your firm would be involved in providing services to RIHousing. Provide appropriate background information for each person and identify their responsibilities.

3. If applicable, please indicate the name of any subcontractors that would be involved in providing services to your firm and to RIHousing. Provide appropriate background information for each person or entity, identify the person’s responsibilities and outline their capabilities.



- 4. Provide a detailed list of references, including a contact name and business telephone number for organizations or businesses for whom you have performed similar work.
- 5. 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).
- 6. Describe your firm's information security systems and the steps that your firm takes to safeguard client communications, confidential information, and client data. Include in your response whether your firm performs penetration testing, your firm's encryption methods, and whether client data is stored onshore or offshore.

**Section C: Fee Structure (Total word limit: 500 words)**

The cost of services is one of the factors that will be considered in awarding this contract. The information requested in this section is required to support the reasonableness of your fees.

- 1. Please provide 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 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.

**Section D: Affirmative Action Plan and Minority Owned Business/Women Owned Business**

- 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.

**Section E: Miscellaneous (Total word limit: 1000 words)**

- 1. Discuss any topics not covered in this RFP that you would like to bring to RIHousing's attention.



**Section F. Certifications**

All applicants must respond to and provide documentation as outlined in the Request for Proposals Submission Certifications at Attachment A.

**EVALUATION AND SELECTION**

A selection committee consisting of RIHousing employees will review all proposals that meet the requirements set forth in the “Instructions” section of this RFP and make a selection based on the following factors:

- Professional capacity to undertake the Scope of Work and the ability to perform within time and budget constraints (as evaluated by reference in Section B: Experience and Resources);
  - 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 fee structure (as evaluated by reference in Section C: Fee Structure);
- Previous work experience and performance with RIHousing and/or similar organizations (as provided in Section B: Experience and Resources, subsection 3);
- Firm minority status and affirmative action program or activities (as requested in Section D: Affirmative Action Plan and Minority Owned Business/Women Owned Business);
- Other pertinent information submitted.

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 RFP, RIHousing has not committed itself to undertake the work set forth herein. 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 its receipt of responses. RIHousing’s decision on these matters is final.

**For additional information contact: HeeJin Kim at [hkim@rihousing.com](mailto:hkim@rihousing.com)**



**Attachment A**

**Requests for Proposals Submission Certifications**

Please respond to **all** items below and include it in your response to this RFP. Be sure to include any additional information in the space provided or as an attachment as needed. Please ensure that any attachments refer to the appropriate item by name (i.e., “Conflict of Interest,” “Major State Decision Maker,” etc.)

**Total word limit for Sections A and B: 500 words**

**Section A: Conflicts of Interest**

1. Identify any conflict(s) 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, check below.**

None

2. Describe how your firm will handle actual and/or potential conflicts of interest (*please include in your proposal or attach a sheet with this information*).

**Section B: Litigation, Proceedings, Investigations**

1. Identify any material litigation, administrative proceedings, or investigations in which your firm is currently involved. **If none, check below.**

None

2. 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 finally adjudicated or settled within the past two (2) years. **If none, check below.**

None

**Section C: 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



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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 below.**

I have read and understand the requirements of Chapter 27 of Title 17 of the Rhode Island General Laws, Reporting of Political Contributions by State Vendors.

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;
- (iii) 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.

**Please indicate your response below.**

Yes

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.

No



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 certify below 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). In addition, if selected, your firm may be requested to provide a copy of its information security plan.

I certify that in the event our firm is selected, we will comply with the Personal Information and Security guidelines noted above.

4. Your firm's president, chairman or CEO must certify below that (i) no member of your firm has made inquiries or contacts with respect to this RFP other than in an email or written communication to **HeeJin Kim** at [hkim@rihousing.com](mailto:hkim@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 3:00pm EST on Friday, November 15, 2024, (iii) all information in the proposal is true and correct to the best of your knowledge, (iv) no member of your firm gave anything of monetary value or promise





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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, (v) your firm did not consult with RIHousing in connection with the development of this RFP, and (vi) 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.

I certify that no member of our firm has made or will make any such inquiries or contacts; all information supplied is true and correct; no member of our firm has provided anything of value to influence RIHousing; and our firm is in compliance with applicable political contribution reporting.

President, Chairman or CEO (*print*): \_\_\_\_\_

Signature: \_\_\_\_\_

Firm Name: \_\_\_\_\_



**SCOPE OF WORK**  
**Attachment B**

**I. SERVICES TO BE PROVIDED**

**Marketing/Advertising/Media Buying**

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, search engines and social media platforms
  - Traditional marketing platforms (i.e. TV, radio, OOH, SEM, etc.)
  - Other emerging and commonly deployed media
- Develop a comprehensive annual marketing strategy, particularly in support of our Homeownership program;
- 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, propose and execute a marketing campaign with a system of measurable results and outcomes:
  - Provide regular reports to determine if efforts are achieving agency goals;
  - Recommend data-driven strategies across marketing platforms to ensure the effectiveness of advertising expenditures;
  - Negotiate fees with selected publications and media outlets;
  - Place ads with media outlets as needed.
- Maintain expert knowledge in the most up-to-date traditional and non-traditional marketing outlets

**Within proposal, please provide project approach and average project cost examples for:**

Development and execution of 90-day comprehensive marketing campaign – including discovery, content creation (graphic packages and :30 advertisement video) and copy writing in both English and Spanish; assuming media buys/placement costs are extra.



**SCOPE OF WORK**  
**Attachment C**

**I. SERVICES TO BE PROVIDED**

**Creative Services**

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 creative services to support advertising, marketing and public information objectives.

Typical examples of Creative Services include:

- Work with agency staff and other contractors to collaboratively develop visual themes and branding that can be applied to a wide variety of media;
- Provide full service video/animation/audio creation, from concept development, filming, editing and post-production;
- Provide wrap-around graphic design services for digital and/or print as well as illustrations that follow agency brand standards;
- Develop timelines for pre-production, production and post-production of the above deliverables and execute on time, and at or below budget;
- Expand and update the agency's brand standards;
- Submit original files of all deliverables (including raw photo and video footages) to RIHousing upon completion.

Firms should demonstrate experience in the following areas:

- **Video / Audio Production:** proven track record of creating high-quality video and audio content. This includes experience in pre-production planning, scripting, storyboarding, filming, sound recording, editing, and post-production work. The firm should possess strong technical skills in operating advanced video and audio equipment, as well as proficiency with editing software.
- **Project Management:** managing all operational, strategic, financial, quote/bid, staffing, and administrative functions relating to design services; coordination with vendors, printers and others.
- **Graphic Design:** 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.

**Within proposal, please provide project approach and average project cost examples for:**

- One double-sided letter-sized marketing flyer.
- 30-day brand-awareness social media campaign package (graphic assets, copy writing, media calendar/plan).
- Cost for one (1), two (2)-minute promotional video, with half-day video shoot, with raw footage.

*Note:* RIHousing will retain proprietary interest in all customized materials, graphics, as well as the look and feel of the deliverables created by selected vendor(s). 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 various outlets.

**SCOPE OF WORK**  
**Attachment D**

**I. SERVICES TO BE PROVIDED**

**Photography**

RIHousing seeks to engage professional photographers to provide a variety of photography services, including architectural photography and events/portrait photography, in support of agency objectives. Photography will be based in and around Rhode Island. RIHousing staff will work with selected vendors and, as appropriate, provide shot lists for various developments/locations, events and activities.

Typical examples of **architectural photography** services include:

- Buildings and developments (before, during and post construction); overview and detail shots
- Neighborhood photographs
- Images illustrating the context of various developments
- Drone/aerial photography ability is a plus

Typical examples of **events photography** services include photographs of:

- Events coverage: media events (groundbreakings, ribbon cuttings), public meetings, and corporate events
- Portraiture/head shots (Group and individual)

For Events Photography: Photographers will need to provide event photos within three (3) business days following the event (*if required sooner, discussed at time of assignment*). Photographers will be responsible for facilitation and signing of all participant release forms, including obtaining group and individual permission for photos that include people.

RIHousing will receive edited, full resolution JPEG for each usable image and access to RAW files as requested for each photograph with full usage rights and ownership. RIHousing retains the right to alter any final images. The selected vendor will not add or embed photos with branding captions or watermark signature on image files provided to RIHousing. Images captured by the selected vendor will be added to RIHousing's photography archive. Photographer credit will be provided as appropriate.

Captured images will be used on all media channels including, but not limited to, RIHousing's website, social media accounts, promotional publications and advertisements, outreach efforts and for use at events and activities. RIHousing will use these images primarily for RIHousing-related materials but may share with development partners as needed.

**Within proposal, please provide project approach and average project cost examples for:**

- Full-Day photography shoot
- Half-day photography shoot
- Hourly rates for specific services



*Portfolio required*

## **SCOPE OF WORK**

### **Attachment E**

#### **I. SERVICES TO BE PROVIDED**

##### **Report Writing**

RIHousing creates and partners with a variety of organizations on the development and creation of a range of reports. The agency believes it will have a need for report writing services to communicate with a wide variety of audiences, including elected officials, housing partners and aligned industries, and the general public. In addition to broad housing market issues, RIHousing may have a need to conduct research associated with its specific business lines including financing of single- and multi-family mortgages, housing development and administration of rental assistance vouchers.

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

- Prepare a variety of reports, including technical reports, position papers and other writing and report efforts as needed, including: feature story writing and submission; agency newsletters, periodic reports, issue briefs/papers, e-newsletters and publications;
- Communicate the impact of our work and work of our partners to key audiences;
- Position RIHousing as a thought-leader; share data and research in a thoughtful and compelling way for a variety of channels, including but not limited to print, digital, mixed-media;
- Translate complicated concepts, data and research into compelling and thought-provoking reports;
- Work alongside agency staff and consultants, including designers, to draft and finalize reports, including reports on state housing goals and strategies, technical reports on housing data, position papers, agency annual report and other writing and report efforts as needed.

Firms should demonstrate experience in the following areas:

- Familiarity with a wide range of housing demographic, and economic data sources
- Experience within the past five years of producing similar products
- Ability to conduct geospatial analysis using ArcGIS or similar systems
- Experience using and producing econometric models, forecasts, and analysis for the housing sector
- Technical, policy and “popular” reports (i.e.. Annual report) writing
- Excellent report writing skills; adherence to AP style, strong Microsoft Office applications skills, proof-reading skills
- Crisp, clear writing style - communications-centered report writing and data analytics skills

**Within proposal, please provide project approach and average project cost examples for:**

- Annual Report – refer to past examples of RIHousing annual reports:  
(<https://www.rihousing.com/research-reporting/>)



- Technical report similar to 2016 “Projecting Future Housing Needs” report (<https://www.rihousing.com/rihousing-reports/>)

## SCOPE OF WORK

### Attachment F

#### **I. SERVICES TO BE PROVIDED**

##### **Production of State or Federal Required Plans or Reports**

The U.S. Department of Housing and Urban Development (HUD) requires that jurisdictions receiving funds through Community Planning and Development (CPD) programs produce a number of plans and reports in order to administer these funds (24 CFR 91). These reports include:

- **Five-Year Consolidated Plan:** This plan is intended to guide the investment of CPD resources including HOME, Community Development Block Grants, and Emergency Solution Grants. Rhode Island’s current Consolidated Plan runs from 2020-2024 and can be found on RIHousing’s website at [https://www.rihousing.com/wp-content/uploads/FINAL-2020-2024-Rhode-Island-Consolidated-Plan\\_PUBLICATION\\_7.9.pdf](https://www.rihousing.com/wp-content/uploads/FINAL-2020-2024-Rhode-Island-Consolidated-Plan_PUBLICATION_7.9.pdf). The next plan must be developed and submitted to HUD by May 15, 2025.
- **Annual Action Plan:** HUD also requires that participating jurisdictions adopt an Annual Action Plan, that describes how CPD program resources will be invested to further the goals and strategies in the Consolidated Plan. Rhode Island’s 2021 Program Year Action Plan is available on RIHousing’s web page at <https://www.rihousing.com/wp-content/uploads/AAP-PY21-Final.pdf>.
- **Consolidated Annual Performance and Evaluation Report:** Participating jurisdictions are required to provide an annual CAPER that demonstrates how resources were expended and the progress that has been made toward achieving proposed goals. Rhode Island’s 2020 Program Year draft CAPER is available on RIHousing’s website at <https://www.rihousing.com/wp-content/uploads/CAPER-PY2020-Final.pdf>.
- **Fair Housing:** In addition, the Consolidated Plan regulations require each state and local government to submit fair housing planning documentation. This means it will: 1) conduct an Analysis of Impediments to Fair Housing Choice (AI), 2) take appropriate actions to overcome the effects of impediments identified through that analysis; and 3) maintain records reflecting the analysis and actions. Rhode Island’s most recent AI was completed in 2020 and is available on RIHousing’s website at [https://www.rihousing.com/wp-content/uploads/RI-AI-Final\\_06.29.20-3.pdf](https://www.rihousing.com/wp-content/uploads/RI-AI-Final_06.29.20-3.pdf). This requirement is in the process of being updated as a result of the Affirmatively Furthering Fair Housing regulation, and respondents should be prepared to produce materials that adhere to this requirement as well.

RIHousing and the Rhode Island Office of Housing and Community Development (OHCD) share in the administration of HUD’s statewide CPD programs and work together to provide the required reports



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described above. RIHousing is seeking firms that could assist in the development of one or all of these reports and potentially other State or HUD reporting requirements.

Within proposal, firms should provide project approach, average project cost examples, and demonstrate experience in the following areas:

- Familiarity with HUD rules and regulations for CPD programs.
- Firm must have experience producing some or all of these reports, as described above, within the last five years, preferably at the state or regional level.
- Firm must have experience within the last five years in collecting and analyzing regional data regarding housing stock, the housing market, economic conditions, infrastructure needs, homeless needs and facilities, and/or community development needs.



**SCOPE OF WORK**  
**Attachment G**

**I. SERVICES TO BE PROVIDED**

**Grant Writing**

RIHousing regularly applies for federal, state and private resources to support its ability to carry out its mission and is seeking a vendor that can assist in writing and submitting these applications. These applications may be associated with any of RIHousing's business lines including Loan Origination, Loan Servicing, Multifamily Development, Rental Assistance, Asset Management, and more.

RIHousing is particularly interested in vendors with experience applying for resources offered through the U.S. Department of Housing and Urban Development (HUD). Many of these application opportunities would benefit from more specific knowledge of HUD programs and services. In particular, RIHousing is seeking vendors with experience working with programs under HUD's Office of Multifamily Housing including Performance Based Contract Administration, HUD's Office of Public and Indian Housing including the Housing Choice Voucher program and specialty voucher programs, and HUD's Office of Community Planning and Development including homeless programs, HOME, and the Housing Trust Fund.

Vendors should indicate in their response if they are interested in general grant writing and/or HUD-specific resource opportunities.

Selected vendors should have experience within the past five (5) years applying for state and/or federal resource opportunities and should provide supporting information indicating the nature of the resource opportunities they have assisted with.

Vendors interested in assisting with HUD-specific resource opportunities should have experience within the past five years of assisting with HUD NOFA responses or other HUD resource applications or providing technical assistance or consulting services specific to HUD programs. Vendor responses should specify the HUD programs and services they have experience with and the nature of the services they have provided.

Within their proposal, respondents should be able to demonstrate their familiarity with the federal grant making process and their effectiveness in helping applicants, particularly public, quasi-public or nonprofit applicants, access resources. Respondents should also provide details of project approach and average project cost examples.





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**SCOPE OF WORK**  
**Attachment H**

**I. SERVICES TO BE PROVIDED**

**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.

**Within proposal, 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.



**SCOPE OF WORK**  
**Attachment I**

**I. SERVICES TO BE PROVIDED**

**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 processes 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 measurements" 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.

**Within proposal, please 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.



**SCOPE OF WORK**  
**Attachment J**

**I. SERVICES TO BE PROVIDED**

**Industry/Market Analysis/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 analysis 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.

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.

**Within proposal, please 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.



**SCOPE OF WORK**  
**Attachment K**

**I. SERVICES TO BE PROVIDED**

**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 a 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.
- Assist with communications and strategies for engaging policy leaders on housing issues.

Firms should have experience in:

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

**Within proposal, please provide project approach and both hourly rate(s) and proposed number of hours per month.**



**SCOPE OF WORK**  
**Attachment L**

**I. SERVICES TO BE PROVIDED**

**Website Hosting, Maintenance and Support**

RIHousing believes it will have need for website hosting, maintenance and support for its agency external website ([www.rihousing.com](http://www.rihousing.com)) in addition to any necessary expansion of the site and/or creation of additional websites or platforms.

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

- **Website Hosting:** contractor will host the website at WP Engine and perform hosting-related services as requested by RIHousing. Contractor will provide direct administrative access to RIHousing for any third-party accounts, subscriptions, or control panels/configurations. Contractor can manage these accounts on behalf of RIHousing, but it is understood that any accounts are to be the responsibility of RIHousing.
- **Website Maintenance and Updates:** Vendor will maintain and update the website. Such maintenance services shall include, but may not be limited to: implementing all necessary updates, bug fixes, and other improvements or repairs; remaining aware of advances in technologies related to or used in website hosting and platforms, including those related to security, and implementing such changes as reasonably necessary to ensure the website's continued interoperability and compatibility with new standard technologies, as well as its security and integrity; quarterly checks to ensure that the website works correctly in current/most common web browser versions; content editing, updates, formatting, and structural changes as requested by RIHousing; and participating in meetings, phone calls, and other project administration activities.
- **Website Expansion and Improvements:** RIHousing may request that Vendor perform website expansion and improvement activities. Such activities may include: creation of new pages, templates, or other Wordpress structural changes; implementation of new functionality, whether by use of a new WP plugin or other means (i.e. custom development); and establishing new integrations with other RIHousing data systems, logins, or websites.
- **Support, Training and Other Services:** on an as-needed basis, contractor shall provide other "non-technical" services which may include, but may not be limited to, the creation of help/training documents, training sessions for administrative users, and coordination with other systems or teams.

**Within proposal, please provide project approach and average project cost examples for:**

- General web maintenance for one (1) website (rihousing.com)
- Design, development and deployment of one (1) new webpage.