

Request for Action
by
Board of Commissioners

**Pre-Qualification of Communication Services
and Data Research Firms**

1. Summary of Request

This Request for Action (“RFA”) is for the authorization of Rhode Island Housing and Mortgage Finance Corporation (“RIHousing”) to establish a roster of pre-qualified communication services and data research firms. RIHousing may accept bids from and engage such firms on an as-needed basis to provide (i) communication services and (ii) housing related research, analysis and reporting services.

Periodically, RIHousing engages firms to provide it with communication services in the following categories: public and stakeholder engagement; focus groups, surveys, in-depth interviews and facilitated meetings; industry and market analyses and business planning; marketing; advertising; graphic design; video and audio recording and production; and strategic communication advice and counsel. In addition, RIHousing recently identified a need for broader research, analysis and reporting services to provide housing related research and policy recommendations, and the production of plans and reports as required by the U.S. Department of Housing and Urban Development and other federal regulatory agencies. Consequently, RIHousing issued the following Requests for Proposals (“RFPs”) to create a roster of qualified firms to fulfill these needs:

a. Communication Services

In October 2021, RIHousing issued an RFP seeking qualified firms to provide it with communication services in the following categories (collectively “Communication Services”):

- A. Marketing/Advertising/Media Buying
- B. Creative Services
- C. Media Relations
- D. Report Writing
- E. Video/Audio Recording and Production
- F. Photography
- G. Website Hosting, Maintenance and Support
- H. Public and Stakeholder Engagement
- I. Focus Groups, Surveys, In-depth Interviews, & Facilitated Meetings
- J. Strategic Communications Advice and Counsel

The RFP notice was posted on the RIHousing website and the website maintained by the State of Rhode Island Department of Administration, Division of Purchases. In addition, the RFP was sent by email to more than 180+ public information/communications agencies and trade associations as well as 80 contacts who have signed up to receive RFP notifications from RIHousing.

Overall, RIHousing received proposals from sixteen (16) unique firms, with some firms applying for multiple service categories.

A selection committee comprised of RIHousing staff (the “Review Committee”) reviewed the responses in accordance with the criteria set forth the RFP and determined whether respondents were qualified to perform the required services. Based on this review, RIHousing seeks approval to include the following sixteen (16) firms on its roster for Communication Services (please note, some firms appear under more than one category):

Marketing/Advertising/Media Buying

Advocacy Solutions
Allen Roche Group
DDL Advertising
ESM (Electric Symphony Media)
Glad Works
Luminous
SCS (Systems Change Strategies)
Trailblaze Marketing
True North Inc.

Creative Services

Advocacy Solutions
Allen Roche Group
DDL Advertising
Glad Works
Luminous
SCS (Systems Change Strategies)
Shields Design Studio
Trailblaze Marketing
True North Inc.

Media Relations

Advocacy Solutions
SCS (Systems Change Strategies)

Report Writing

Advocacy Solutions
SCS (Systems Change Strategies)

Video/Audio Recording and Production

Advocacy Solutions
Allen Roche Group
Glad Works
Luminous
SCS (Systems Change Strategies)
Shields Design Studio
Sociable
St. Thomas Sound & Picture
Third Spoon

Photography

Allen Roche Group
Connie Grosch Photography
DDL Advertising
Glad Works
Gretchen Ertl Photography
Luminous
SCS (Systems Change Strategies)
Third Spoon

Website Hosting, Maintenance and Support

Glad Works
Luminous
NineDot
SCS (Systems Change Strategies)
Shields Design Studio

Public and Stakeholder Engagement

Advocacy Solutions
SCS (Systems Change Strategies)

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

SCS (Systems Change Strategies)

Strategic Communications Advice and Counsel

Advocacy Solutions
SCS (Systems Change Strategies)

b. Data Research Services

In October 2021, RIHousing issued an RFP seeking qualified firms to provide housing related research, analysis and reporting services (“Data Research Services”). The RFP notice was posted on the RIHousing’s website and the website maintained by the State of Rhode Island Department of Administration, Division of Purchases, as well as the

local and national websites for the American Planning Association. In response to the RFP, RIHousing received proposals from five (5) firms.

The Review Committee reviewed the responses in accordance with the criteria set forth in the RFP and determined that each of the five (5) respondents whose submissions met the threshold requirements was qualified to perform the services. Based on this review, RIHousing seeks approval to include the following firms on its roster of Data Research firms (please note, some firms appear under more than one category):

Production of Plans and Reports

HousingWorks RI
Mullin & Lonergan Associates
Western Economic Services, LLC

Industry/Market Analyses/Business Planning

Ninigret Partners
Western Economic Services, LLC

Housing Related Research, Analysis and Policy Recommendations

January Advisors
HousingWorks RI
Mullin & Lonergan Associates
Ninigret Partners
Western Economic Services, LLC

The selected firms will appear on RIHousing’s roster of pre-qualified Communication Services and Data Research Services for a period of three years, which period may be extended if determined by staff to be in the best interests of the corporation. Staff will engage firms from this list on an as-needed basis or solicit bids for particular projects consistent with RIHousing’s Purchasing Policies.

2. Recommendations

The Review Committee recommends that the Board of Commissioners approve the attached resolution authorizing the creation of a roster of qualified providers of Communication Services and Data Research Services.

3. Attachments

- A. Resolution
- B. Scoring Information

Attachment A

Resolution of the Board of Commissioners of Rhode Island Housing and Mortgage Finance Corporation

WHEREAS: the enabling act of Rhode Island Housing and Mortgage Finance Corporation (“RIHousing”) provides it with all of the powers to make and execute contracts necessary for the exercise of powers and functions provided to it under the Rhode Island Housing and Mortgage Finance Corporation Act, R.I. Gen. Laws §42-55-5(6); and

WHEREAS: RIHousing has determined that it is in the best interests of the corporation to create a roster of approved communication services and data research firms to provide a variety of communication, business planning, marketing and advertising services; produce plans and reports; and perform housing related research and analysis;

WHEREAS: RIHousing issued Requests for Proposals (“RFPs”) for qualified communication services and data research firms; and

WHEREAS: a selection committee comprised of staff reviewed the proposals and evaluated them in accordance with the criteria outlined in the RFPs.

NOW THEREFORE, IT IS HEREBY:

RESOLVED: that RIHousing be, and hereby is authorized, to create a roster of qualified communications and data research firms from which RIHousing may select providers of primary communication, public information, business planning, marketing, advertising, plan- and report-production, and data research services on such matters as the Executive Director or her designee deems advisable or necessary; and

RESOLVED: that RIHousing be, and hereby is authorized, to establish the following roster of firms pre-qualified to provide communications and data research services to the corporation, as such services were described in the RFPs and consistent with the responses submitted in response thereto:

Marketing/Advertising/Media Buying

Advocacy Solutions
Allen Roche Group
DDL Advertising
ESM (Electric Symphony Media)
Glad Works

Luminous
SCS (Systems Change Strategies)
Trailblaze Marketing
True North Inc.

Creative Services

Advocacy Solutions
Allen Roche Group
DDL Advertising
Glad Works
Luminous
SCS (Systems Change Strategies)
Shields Design Studio
Trailblaze Marketing
True North Inc.

Media Relations

Advocacy Solutions
SCS (Systems Change Strategies)

Report Writing

Advocacy Solutions
SCS (Systems Change Strategies)

Video/Audio Recording and Production

Advocacy Solutions
Allen Roche Group
Glad Works
Luminous
SCS (Systems Change Strategies)
Shields Design Studio
Sociable
St. Thomas Sound & Picture
Third Spoon

Photography

Allen Roche Group
Connie Grosch Photography
DDL Advertising
Glad Works
Gretchen Ertl Photography
Luminous
SCS (Systems Change Strategies)
Third Spoon

Website Hosting, Maintenance and Support

Glad Works
Luminous
NineDot
SCS (Systems Change Strategies)
Shields Design Studio

Public and Stakeholder Engagement

Advocacy Solutions
SCS (Systems Change Strategies)

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

SCS (Systems Change Strategies)

Strategic Communications Advice and Counsel

Advocacy Solutions
SCS (Systems Change Strategies)

Production of Plans and Reports

HousingWorks RI
Mullin & Lonergan Associates
Western Economic Services, LLC

Industry/Market Analyses/Business Planning

Ninigret Partners
Western Economic Services, LLC

Housing Related Research, Analysis and Policy Recommendations

January Advisors
HousingWorks RI
Mullin & Lonergan Associates
Ninigret Partners
Western Economic Services, LLC

RESOLVED: that RIHousing be, and hereby is authorized, to engage the above-listed firms on an as-needed basis and/or solicit bids or proposals from such firms for specific projects consistent with RIHousing's Purchasing Policies; and

RESOLVED: that the Executive Director, the Deputy Executive Director or the Chief Strategy and Innovation Officer, each acting singly, be and hereby is authorized and empowered to take any and all actions necessary or desirable to carry out the foregoing resolutions, including without limitation the authority to negotiate terms and fees of the engagements as he or she may determine to be in the best interests of RIHousing, and to execute any and all agreements and to take such further actions as he or she deems necessary to carry out the foregoing resolutions.

Attachment B 1

A) Marketing/ Advertising/ Media Buying	2.5	2.5	2.5	3.0	3.0	3.0	2.0	18.5
Gladworks								
A) Marketing/ Advertising/ Media Buying	2.5	2.5	2.5	3.0	3.0	3.0	2.5	19.0
B) Creative Services	2.5	2.5	2.5	3.0	3.0	3.0	2.5	19.0
E) Video/Audio Recording and Production	2.5	2.5	2.5	3.0	3.0	3.0	2.5	19.0
F) Photography	2.5	2.5	2.5	3.0	3.0	3.0	2.5	19.0
G) Website Hosting,Mainte- nance & Support.	2.5	2.5	2.5	3.0	3.0	3.0	2.5	19.0
Gretchen Ertl								
F) Photography	2.5	2.5	3.0	3.0	2.0	2.5	3.0	18.5
Luminous								
A) Marketing/ Advertising/ Media Buying	2.0	2.5	2.5	2.5	2.5	2.5	2.0	16.5
B) Creative Services	2.0	2.5	2.5	2.5	2.5	2.5	2.5	17.0
E) Video/Audio Recording and Production	2.0	2.5	2.5	2.5	2.5	2.5	2.5	17.0
F) Photography	2.0	2.5	2.5	2.5	2.5	2.5	1.5	16.0
G) Website Hosting,Mainte- nance & Support.	2.0	2.0	2.0	2.5	2.0	2.5	3.0	16.0
NineDot								
G) Website Hosting,Mainte- nance & Support.	2.5	2.5	3.0	2.5	3.0	2.5	2.5	18.5
SCS								
A) Marketing/ Advertising/ Media Buying	2.5	2.5	2.5	2.5	2.5	3.0	3.0	18.5
B) Creative Services	2.5	2.5	2.5	2.0	2.5	3.0	3.0	18.0
C) Media Relations	2.0	2.0	2.0	2.0	2.0	2.0	3.0	15.0
D) Report Writing	2.0	2.0	2.0	2.0	2.0	2.0	2.5	14.5
E) Video/Audio Recording and Production	2.0	1.5	1.5	2.0	2.0	2.0	2.5	13.5

Attachment B 1

F) Photography	2.0	1.5	1.5	2.0	2.0	2.0	2.5	13.5
G) Website Hosting,Maintenance & Support.	2.0	2.0	2.0	2.0	2.0	2.0	2.5	14.5
H) Public and Stakeholder Engagement	2.0	2.0	2.0	2.0	2.0	2.5	2.5	15.0
I) Focus Groups, Surveys, In-depth Interviews, & Facilitated Meetings	2.0	2.0	2.0	1.5	2.0	2.5	2.5	14.5
K) Strategic Communications Advice and Counsel	2.5	2.5	2.5	2.5	2.5	2.5	2.5	17.5
Shields Studio								
B) Creative Services	2.5	2.5	2.0	2.5	2.5	2.5	2.5	17.0
E) Video/Audio Recording and Production	3.0	2.5	2.5	3.0	2.5	2.5	2.5	18.5
G) Website Hosting,Maintenance & Support.	2.5	2.5	2.5	2.5	2.5	2.5	2.5	17.5
Sociable								
E) Video/Audio Recording and Production	1.5	1.0	1.5	1.5	1.5	1.5	2.5	11.0
Sound & Picture								
E) Video/Audio Recording and Production	2.0	2.0	2.0	2.5	1.5	2.0	2.5	14.5
Third Spoon								
E) Video/Audio Recording and Production	3.0	2.5	2.5	2.5	2.5	2.5	2.5	18.0
F) Photography	3.0	2.5	2.5	2.5	2.5	2.5	2.5	18.0
Trailblaze								
A) Marketing/ Advertising/ Media Buying	2.5	2.5	2.5	2.5	2.5	2.5	2.5	17.5
B) Creative Services	2.5	2.5	2.0	2.5	2.5	2.0	2.5	16.5
True North								

Attachment B 1

A) Marketing/ Advertising/ Media Buying	2.5	2.5	2.5	2.5	2.5	3.0	2.0	17.5
B) Creative Services	2.5	2.5	2.5	2.5	2.5	3.0	2.0	17.5

ATTACHMENT B 2

Firm:	January Advisors	Mullin & Lonergan	HWRI	Ninigret Partners	Western Economic
Proposed services (attachments)	C	A,C	A,C	B,C	A,B,C
Track Record	2	3	2	3	3
Experience with quasi/public agencies	2	3	2	3	3
Experience with similar projects	2	3	2	2	3
Quality of work samples	3	2	1	2	2
Quality of proposal	3	2.5	2	3	3
Capacity of team	2	2.5	1	2	3
Company Remuneration	1	2	3	2	1
Total Score	15	18	13	17	18