

Request for Proposals Communications and Public Information Services

INTRODUCTION

Through this Request for Proposals (“RFP”), Rhode Island Housing seeks proposals from qualified firms to submit proposals for communications and public information services. Rhode Island Housing currently has a recognized and respected brand but wishes to further build upon and position itself to meet the ever changing housing landscape in our state while also maximizing emerging opportunities. Moving forward we need to maintain Rhode Island Housing’s proactive media strategies to increase public recognition and support of our affordable housing efforts and those of our partners. Due to the diverse nature of our mission, it is expected that one or more firms may be engaged to provide the communication services in support of our mission.

INSTRUCTIONS

One (1) original and five (5) copies of your proposal must be submitted to Rhode Island Housing, 44 Washington Street, Providence, R.I. 02903-1721, Attn: Mary Kate Harrington, Public Information Manager. Proposals should be concise and include all attachments and work samples. The quality and effectiveness of the proposal will be a factor in the decision as to selection of a firm(s).

Proposals must be postmarked and received no later than 5:00 p.m. EST on Friday, August 22, 2014.

Respondents are advised that all submissions (including those not selected for engagement) may be made available to the public on request upon completion of the process and award of a contract(s). Accordingly, any information included in the proposal that the respondent believes to be proprietary or confidential should be clearly identified as such.

BACKGROUND

For more than 40 years, Rhode Island Housing has been making it easier for people to make Rhode Island their home.

Rhode Island Housing is a self-sustaining public agency, which generates its own operating income. Everything we earn is reinvested to provide safe, healthy homes for Rhode Islanders. We were formed by the State Legislature in 1973 to tackle Rhode Island’s widespread, critical housing issues, but we do so as a private entity, bringing about \$400 million investor dollars into the state each year.

Rhode Island Housing works to ensure that all people who live or work in Rhode Island can afford a safe, healthy home that meets their needs. Our belief is that a home

encompasses much more than four walls and a roof. A good home provides the foundation upon which families can thrive, children can learn and grow, and communities can prosper.

To achieve our mission, we do the following:

- Offer fair, affordable and innovative lending programs
- Provide housing related education to consumers and others
- Promote and finance sensible development that builds healthy, vibrant communities
- Provide housing grants and subsidies to Rhode Islanders with the greatest need
- Work with partners to improve everything we do

SCOPE OF SERVICES

Rhode Island Housing is seeking the services of qualified parties to carry out communications and public information services as needed in support of its mission. Due to the diverse nature of our mission, it is expected that one or more firms may be engaged to provide the communication services outlined in the Scope of Work provided at Attachment A. The initial contract term is expected to be for a period of two years with additional one-year options at the sole discretion of Rhode Island Housing, with each year dependent on the availability of funding in the annual budget.

Please see Attachment A: Scope of Work

INTELLECTUAL PROPERTY RIGHTS

Rhode Island Housing intends, to the extent permitted by law, that all works created by the successful bidder under this RFP shall be the exclusive property of Rhode Island Housing and shall be deemed “work for hire” under the United States Copyright Act. The successful bidder agrees to execute any documents reasonably required by Rhode Island Housing to evidence Rhode Island Housing’s exclusive ownership of the works, 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. Experience and Resources

1. Describe your firm and its capabilities. In particular, support your capacity to perform the Scope of Work. Please describe how your firm is the best organization to serve the communications and public information needs of Rhode Island Housing.
2. Please demonstrate experience in working with statewide media and community partners and your experience in providing communications services to public purpose agencies.
3. How would your work integrate with and build upon the current communication and public information capital of Rhode Island Housing?
4. Please describe your capacity and experience with electronic communications including websites, e-news and social media platforms.
5. Please include examples of your work that demonstrate your ability to meet the communications and public information needs of Rhode Island Housing. The examples may be in digital or hard-copy form and should include at least one communications plan.
6. Please include a list of your 3 largest accounts including a lead contact name and telephone number of those organizations or businesses. Other representative client information is also encouraged.
7. Indicate which services you would perform in-house and which would require outside vendors/consultants. Please demonstrate your firm's experience and ability in providing immediate response for tasks that demand it (i.e. crisis communications, media responses).
8. Indicate which principals and associates from your firm would be involved in providing services to Rhode Island Housing. Provide appropriate background information for each such person and identify his or her responsibilities.
9. 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 Rhode Island Housing.
10. Describe how your firm will handle actual and or potential conflicts of interest.

C. Fee Structure

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 your proposed fee structure, including proposed retainer and included services, if any, and include an itemized breakdown of hourly rates for key personnel assigned to Rhode Island Housing activities. Where appropriate, please indicate fixed fee pricing proposals.

Please provide average project cost examples for:

- One, four-panel, four-color brochure - including discovery, interviews, copy writing and design assuming printing and photography is extra
- One 16 page annual report comparable to Rhode Island Housing's 2012 and 2013 annual reports - including discovery, interviews, copy writing and design, assuming printing and photography are extra, and
- One press release - assuming discovery, interviews, distribution, follow-up and coordination.

Rhode Island Housing is open to alternative and creative cost models and schedules. The proposed cost of services is an important, but not the determining factor, in the selection process.

2. Provide an itemized breakdown 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 Rhode Island Housing.

D. Miscellaneous

1. Rhode Island Housing encourages the participation of persons of color, women, persons with disabilities and members of other federally and State-protected classes. Please include, if applicable, a copy of your Minority- or Women-Owned Business Enterprise state certification or any other information you deem appropriate.
2. Discuss any topics not covered in this Request for Proposals that you would like to bring to Rhode Island Housing's attention.

E. Certifications

1. Rhode Island Housing 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 Rhode Island Housing, 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;

(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.

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. 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 Mary Kate Harrington, mharrington@rhodeislandhousing.org, 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 22, 2014, (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 Rhode Island Housing 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 Rhode Island Housing employees (the "Committee") will review all proposals and make a determination based on levels of capacity and stated expertise. All responsive proposals will be evaluated based on the following factors:

- Professional capacity to undertake the Scope of Work
- Ability to provide the communications/public information services requested in a professional and timely manner
- Ability to maintain the high customer service and public information standards of Rhode Island Housing
- Ability to meet the eligibility requirements as set forth in this document
- Current media contacts
- Proposed fee structure
- Previous work experience and performance with Rhode Island Housing and/or similar organizations and quality of prior work product
- Response to Rhode Island Housing's concerns regarding intellectual property rights.
- Other pertinent information submitted

Rhode Island Housing may invite one or more finalists to make presentations. In its sole discretion, Rhode Island Housing may negotiate with one or more firms who have submitted proposals to submit more detailed proposals or to negotiate a final cost or scope of work. It is possible that Rhode Island Housing will not undertake any work directly or may engage a subsidiary or independent entity to engage professionals to undertake any or all of the work.

By this Request for Proposals, Rhode Island Housing has not committed itself to undertake the work set forth. Rhode Island Housing 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 bidders. Rhode Island Housing reserves the right to make those decisions after receipt of responses. Rhode Island Housing's decision on these matters is final.

For additional information contact: Mary Kate Harrington,
mharrington@rhodeislandhousing.org.

Attachment A Scope of Work

Rhode Island Housing is seeking the services of a qualified party or parties to carry out communications and public information services as needed in support of its mission. Due to the diverse nature of our work and the various audiences and constituencies we work with, one or more firms may be engaged to provide the communication services listed below. The initial contract term is expected to be for a period of two years with additional one-year options at the sole discretion of Rhode Island Housing, with each year dependent on the availability of funding in the annual budget. All work created under contract will be the property of Rhode Island Housing.

Background

Rhode Island Housing's mission is multifaceted and we hold many roles within the state. Please refer to Attachment B: *Who We Are, What We Do* for additional information on our efforts. During the past 40 years, Rhode Island Housing has enjoyed notable success, including assisting over 60,000 Rhode Islanders with the purchase of their first home, financing the construction of safe, affordable homes in every municipality in the state, serving homeowners in need through our HelpCenter and foreclosure mediation efforts, providing annual rental assistance to more than 17,000 Rhode Island households and oversight of more than 23,000 affordable apartments.

Due to recent disruptions in the housing market, increased unemployment and a lingering recession, we have experienced a growing demand for our services while at the same time experiencing a reduction in federal funding and support. Our goal is to maintain financial stability while continuously seeking to expand services to the residents of our state. To achieve this goal, we need to ensure that the people of Rhode Island are aware of the services available to them and the importance of healthy, affordable homes in building strong communities and successful individuals.

Existing Communications Channels

We advance our mission by creating a network of resources, including community stakeholders, public officials, residents, businesses, government and housing experts, to increase the supply and availability of affordable housing throughout Rhode Island. Rhode Island Housing currently has a recognized and respected brand but wishes to further build upon and position itself to meet the ever changing housing landscape in our state while also maximizing emerging opportunities.

We take a coordinated approach to outreach and communications efforts, utilizing traditional and emerging communications tactics and tools to reach targeted audiences throughout our state. The key to our success is our ability to adapt to the ever-changing needs of our customers and partners while strategically utilizing all existing resources. We employ traditional public relations and grassroots communications tactics, digital and direct marketing, social media, targeted advertising, partnership programs, events and tradeshow to position ourselves as a statewide resource for the people of our state.

Communications Needs

In order to effectively advance our mission as the state's principal housing agency, we require a communications firm(s) to assist us in strategically positioning ourselves to continue our leadership role in affordable housing efforts throughout Rhode Island. Moving forward we need to maintain Rhode Island Housing's proactive media strategies to increase public recognition and support of affordable housing efforts and those of our partners.

Respondents may elect to prepare a proposal for all or **portions** of this Scope of Work. Rhode Island Housing has the unique challenge of needing to reach multiple audiences with differing tactics in order to be successful. Both agency-to-partner and agency-to-consumer perspectives will be required to effectively develop marketing approaches and tactics in support of our communications efforts.

Successful respondents will:

- Build upon the strong reputation and community contacts of Rhode Island Housing to enhance its financial stability and expand its services to the residents of Rhode Island
- Develop and execute an annual media relations plan that includes a schedule of recommended editorial and promotional activities within each target market
- Guide the execution of creative marketing and communication campaigns, including the promotion of our programs and loans through:
 - Websites and social media platforms
 - Mass media communications and publicity
 - Direct marketing to customers and potential customers
 - Print and collateral materials including newsletters, brochures, advertisements, and other print communications
 - Other emerging and commonly deployed media
- Assure that elected and other public officials have effective knowledge of the roles and programs of Rhode Island Housing and the importance of affordable housing finance to the residents and economy of our state.
- In coordination with internal staff, help set priorities and refine marketing and communications strategies for the agency
- Work with various divisions on communications tactics to most effectively deliver their programs
- Conduct relevant marketing research and analysis and design marketing and communications collateral
- Craft effective press releases and media pitches for local, statewide, and when appropriate, national media outlets
- Work to improve communications across many audiences and ensure that all visual and written materials meet the standards of Rhode Island Housing
- Assure that our communications promote 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
- Provide training, where appropriate, to staff and partners

- Provide support to all Rhode Island Housing outreach activities and assist with the monitoring and oversight of organization-wide communications standards and guidelines to provide continuity and consistency of communication activities and organization branding
- Promote openness and transparency across the agency, its programs and processes.

The successful agency(s), from time to time, will be asked to provide communications services which may include some components or all of the following:

- **Integrated Marketing and Communications Planning:** Strategic development and implementation of an integrated and consistent public information program to provide top quality service to Rhode Island Housing's customers and partners and achieve its public purpose mission. Plan components may include some or all of the following:
 - Strategic Communications and Marketing Planning
 - Market Research
 - Focus Group Administration
- **Public Relations Services:** Including media planning; media relations development and response; press conference and event management; crisis management; community outreach; governmental and public affairs.
- **Advertising and Creative Design:** Develop and coordinate advertising and informational campaigns including marketing materials for various audiences; account management (including media buying capacity); social media campaign coordination; community outreach support; ongoing brand and sub-brand strategic communications support.
- **Creative Writing:** Feature story writing and submission; agency newsletters, periodic reports, issue briefs/papers, e-news and publications.
- **Web Design and Electronic Communication:** Expansion of existing websites (www.rhodeislandhousing.org, www.loans.rhodeislandhousing.org and www.keeppspace.org); electronic newsletters; social media platforms and other emerging technologies.

Attachment B

Who We Are, What We Do

Who We Are

Rhode Island Housing is an agency of the state of Rhode Island. Our mission is to make living in Rhode Island affordable by reducing the cost of renting or owning a home. We do this by making loans to buy or build homes, providing housing assistance to owners and renters, working to end homelessness, and creating KeepSpace communities where neighbors meet, people work and children play.

Rhode Island Housing. . .

- is a self-supporting agency of the state of Rhode Island, and receives no direct state funding for our operations.
- is like a community bank in that we primarily support our self by making loans with private capital, and through the administration of federal housing programs.
- invests all of our resources in achieving our mission.

What We Do

Loans to Build Homes

Rhode Island Housing provides financing for approximately 14% of all year-round rental homes in Rhode Island. We work closely with builders and community partners on the construction, rehabilitation and preservation of affordable homes throughout the state. These homes serve a wide variety of populations, including families, veterans, individuals with special needs, the homeless or those at risk of homelessness.

We achieve this by:

- Administering federal housing credits
- Providing financing for construction loans and permanent loans
- Administering state and federal development financing programs

Loans to Buy Homes

Rhode Island Housing works with community and business partners to make homeownership a reality for as many Rhode Islanders as possible. Through our network of Participating Lenders and our Loan Center, we offer loans at attractive interest rates with reduced down payment requirements. We also offer extra assistance loans for down payments and closing costs. All of our loans are serviced at our Providence headquarters, allowing us to provide the highest quality customer service.

We achieve this by:

- Making loans directly and through our Participating Lender network
- Offering educational support and services to help homebuyers become successful homeowners
- Helping nearly 65,000 Rhode Island families buy their first home
- Providing local servicing and support for more than 9,000 homeowners across the state

Housing Help for Owners

In addition to helping people buy the home of their dreams, we also work to help struggling Rhode Islanders keep their homes. Our HelpCenter offers counseling and technical assistance to cost burdened homeowners and mediation services to many Rhode Islanders facing foreclosure. Since the passage of the Madeline Walker act in 2006, Rhode Island Housing has purchased delinquent tax, water or sewer liens to give homeowners extra time and counseling support to work through their financial and often personal issues.

We achieve this by:

- Providing foreclosure-prevention assistance through the HelpCenter and mediation efforts
- Purchasing tax liens and providing assistance under the Madeline Walker Act
- Providing home maintenance loans that allow for lead remediation, septic system repair, energy savings and more

Housing Help for Renters

Rhode Island Housing provides rental assistance to thousands of Rhode Islanders in need. With federal and state support, along with our own funds, we help ensure Rhode Islanders have a healthy place to live and that there are programs in place to help them gain independence and self sufficiency.

We achieve this by:

- Distributing \$150 million in Section 8 rental subsidies each year
- Administering programs that provide support for youth, the elderly and those seeking financial independence
- Connecting at-risk Rhode Islanders with resources necessary to help them find a safe, healthy home
- Providing rental assistance to more than 15,000 families and individuals

Working to End Homelessness

Utilizing federal and state funds along with our own resources, Rhode Island Housing works with hundreds of partners to address the issue of homelessness in the state. We fund housing, rental assistance and supportive services for the chronically homeless and those experiencing homelessness for the first time.

We achieve this by:

- Administering federal funding to support more than 45 homeless assistance programs throughout the state
- Funding programs designed to provide supportive housing solutions for individuals and families with special needs
- Administering and supporting programs devoted to addressing the needs of both short-term and chronically homeless populations