



Request for Proposal (RFP) for an Inclusionary Marketing Consultant

Overview

MassHousing is an independent, quasi-public agency created in 1966 and charged with providing financing for affordable housing in Massachusetts. The Agency raises capital by selling bonds and lends the proceeds to low- and moderate-income home buyers and home owners, and to developers who build or preserve affordable and/or mixed-income rental housing. MassHousing does **not** use taxpayer dollars to sustain its operations, although it administers some publicly funded programs on behalf of the Commonwealth. Since its inception, MassHousing has provided more than \$20 billion for affordable housing.

The Massachusetts Housing Finance Agency (“MassHousing”) invites proposals from qualified persons or firms interested in entering into a contract for the services as described below.

Scope of Services:

MassHousing is seeking to contract with a marketing/public relations/communications advisor to help build awareness of MassHousing as a socially conscious provider of affordable home mortgage loans, particularly to Black home buyers and other Persons of Color in Massachusetts.

The engagement will be a critical component of a larger objective to increase the number of loans made to homebuyers who are Black or who are other Persons of Color who have historically been underrepresented by the conventional lending industry. The engagement is expected to last approximately three months and could potentially be extended depending on outcomes. The budget for this initial engagement is not to exceed \$100,000.

Deliverables:

- Work with MassHousing staff to understand the Agency’s history and mission as a quasi-public lending institution and to understand the Agency’s business challenges.
- Evaluate and provide critical analysis of MassHousing’s existing marketing content and channels to determine if they can be optimized to resonate more with, and be more culturally relevant to, the target demographic.
- Provide recommendations for new strategies, tactics and messages that will help position MassHousing as a trusted and reliable source of information and home financing for Black low- and moderate-income homebuyers and other Persons of Color.

- Provide MassHousing with recommendations for new opportunities to connect with lenders, realtors, faith leaders, community influencers and others who can help MassHousing deliver its products at a grass-roots level.
- Work with MassHousing to develop metrics that can be used to measure effectiveness of marketing strategies.

Submission Requirements:

- (A) Background Information. A cover letter or executive summary signed by a person authorized to enter into a contract with MassHousing containing at least the following information: (i) name, address, and telephone number of a contact person, (ii) a description of the firm, and (iii) the firm's Federal Taxpayer I.D. Number. MassHousing is an equal opportunity employer and encourages responses from entities which are certified as minority- and women-owned business enterprises (MBEs and WBEs), veteran-owned business enterprises (VBEs), disability-owned business enterprises (DBEs), and lesbian/gay/bisexual/ transgender-owned business enterprises (LGBTBEs). If your firm is certified as one or more of the above, please include evidence of such certification(s) or the basis for such designation(s).
- (B) Experience in Providing the Services. Describe the experience of the firm and its personnel in providing similar services. Attach resumes of personnel (or sub consultants, if any) who will be providing the Services.
- (C) A profile of the consultant or consultant team - those who will work directly and indirectly on the project. List names and titles, as well as experience as it relates to this work. Please fully explain the team's and/or individuals' experience with the following:
- Assisting nonprofit organizations or others with similar projects; and
 - Supplemental material that will help the selection team understand the consultant's or teams' approach, previous outcomes, or expected deliverables.
- (D) Work Plan. Provide a description of the plan or approach, the role of each staff member (or sub-consultants, if any) expected to perform the Services, and the proposed time-frames for completion of the Services. Please respond specifically to any questions or specifications requested in the description of the Services.
- (E) Business References. A list of three (3) verifiable client references for whom the consultant has performed similar work in the past five years. Provide contact information, including address, e-mail, and telephone numbers, for the three references.
- (F) Fee Schedule. A detailed budget that breaks out expenses including the consultant's time, materials and supplies, and any other expected expenses.

(G) Other Information:

- Conflicts of Interest. Any known facts which would or may create a conflict of interest with MassHousing if you were awarded a contract for the Services.
- Outstanding Claims, Litigation or Threats of Litigation. Any outstanding claims, litigation, or threats of litigation against your firm or its members.
- Debarment. List any instances in which your firm has been debarred, suspended or otherwise limited from participation by any state or federal government and describe the circumstances for the debarment.

Responses must be received no later than 5:00 P.M. on Wednesday, December 2

MassHousing will review the responses to this RFP, may speak with client references and may decide to interview all or some of the respondents. If MassHousing determines that interviews are necessary, the interviews will be held during the weeks of December 7 and December 14.

The Massachusetts Housing Finance Agency (“MassHousing”) invites proposals from qualified persons or firms interested in entering into a contract for the services described in the Scope of Services. If your firm is interested in providing the Services to MassHousing, please submit your proposal to the email address provided below.

Eric Gedstad, Director of Marketing
egedstad@masshousing.com

Evaluation and Selection:

MassHousing will evaluate respondents based upon (a) the response to this RFP; (b) interview results (if any); (c) references; and (d) any other information requested by MassHousing. MassHousing, in its sole discretion, will make its selection based on the following criteria:

- Understanding of and approach in providing the Services;
- Demonstrated experience and qualifications of firm and personnel in the performance of similar services;
- References;
- Proposed fee structure; and
- MBE, WBE, VBE, DBE, or LGBTBE status.

We anticipate that the selected respondent will be notified by December 30 and anticipate work on the Services to commence on January 5, 2021.

MassHousing is soliciting competitive proposals pursuant to a determination that such a process best serves the interests of MassHousing and not because of any legal requirement to do so. MassHousing accordingly reserves the right to accept any one or more than one proposal; to withdraw or cancel this RFP; to modify or amend, with the consent of the respondent, any proposal prior to acceptance; to reject any or all proposals or waive any informality and otherwise to effect any agreement that MassHousing in its sole judgment, deems to be in its best interest. The successful respondent will be required to enter into MassHousing's Standard Services Agreement, a copy of which will be provided to any respondent upon request.

Should you have any questions concerning this RFP, please e-mail Eric Gedstad, Director of Marketing at egedstad@masshousing.com . In order to ensure fairness, MassHousing will determine, in its sole discretion whether and how to best respond any inquiry regarding this Request for Proposals.