



*Opening doors to a better life*

## **REQUEST FOR PROPOSALS: COMMUNICATION SERVICES**

**Deadline for submission:  
July 31, 2024  
5 p.m. PST**

***Please email to:***  
**Washington State Housing Finance Commission**  
**[Anna.Porkalob@wshfc.org](mailto:Anna.Porkalob@wshfc.org)**

## REQUEST FOR PROPOSALS

The Washington State Housing Finance Commission (“the Commission”) intends to contract with one or more firms to provide a range of communication services between August 2024 and June 30, 2027.

To this end, the Commission is releasing this Request for Proposals (RFP). The Commission may contract with one or more than one firm to provide the services described in this RFP. The Commission reserves the right to approve any and all subcontractors. It is the Commission's intent to appoint the firm or firms selected under this contract in August 2024.

### **Background**

The Washington State Housing Finance Commission is a self-sustaining public agency committed to increasing housing access and affordability for the people of Washington while aligning our work with anti-racist values.

#### **Our Mission**

We work to provide equitable access to capital through strong partnerships and innovative financing to create and sustain affordable rental housing, homeownership, and community spaces across Washington State.

#### **Our Vision**

We envision a just future in which all Washingtonians have affordable, sustainable housing in thriving communities, and in which those representing and served by the Commission experience fair, inclusive practices in all aspects of our work.

#### **Our Values**

- Sound Fiscal Stewardship
- Accountability and Transparency
- Acknowledging and Addressing Power and Privilege
- Respect and Humility
- Equitable and Meaningful Engagement

#### **Our Work:**

Created in 1983 and led by a Governor-appointed board of commissioners, the Commission employs approximately 85 staff members and is based in downtown Seattle. Across Washington state, the Commission finances and/or oversees:

- **Rental housing:**  
The Commission helps to construct and preserve thousands of rent- and income-limited apartments each year through the federal Low Income Housing Tax Credit program and tax-exempt and taxable bonds. These properties serve a wide range of residents, from the most

vulnerable leaving homelessness, to working families, to seniors on fixed incomes. We continue to monitor properties for 30 to 40 years to ensure they remain in compliance.

- **Homeownership:**

The Commission finances home loans and downpayment assistance for low- and moderate-income homebuyers, serving more than 100,000 households since 1983. Homebuyers access these programs –as well as free homebuyer education classes – through our network of hundreds of lenders, real-estate professionals and nonprofits statewide.

In addition, we oversee a statewide network of housing counseling agencies that both prepare people for homebuying and help homeowners who are facing foreclosure.

- **Nonprofit facilities:**

The Commission issues nonprofit revenue bonds that provide lower-cost financing for nonprofit organizations to buy, build, renovate and refinance facilities, including nonprofit nursing and retirement homes.

- **Innovative financing for community needs:**

The Commission offers a range of innovative revolving loan programs for land-banking, community land trusts, manufactured-home communities, sustainable energy, and many other community needs.

## **Deliverables**

The Commission will contract with one or more qualified contractors to perform the following services, at the direction of the Communications Director or other Commission staff.

Proposals may be submitted in one or more of the following areas:

### **COMMUNICATIONS STRATEGY AND MESSAGING**

- **Overall Communications Strategy and Planning**

- General support for WSHFC communications staff, particularly crisis communications planning and management

- **Community Outreach/Engagement**

- Strategies for reaching homebuyers, rental residents, etc. across the state, especially marginalized groups and communities of color

- **Marketing and Branding**

- Develop marketing goals and strategies in partnership with Commission staff, particularly in support of our Homeownership program.

- Analyze and/or conduct market research and expertise to ensure effective outreach to target audiences.
- Develop and implement effective marketing tactics, including ad campaigns, to achieve goals and strategies.
- Provide guidance and expertise to Commission staff on creating and maintaining our brand standards.

## **CREATIVE SERVICES**

- **Photography and Videography**

- At the direction of Commission staff, take photographs and videos that illustrate the Commission's work and impact on individuals and communities.
- Provide full video production; submit finished videos and backup files to the Commission.

- **Graphic Design, Layout and Production**

- Develop visual themes and branding that can be applied to a wide variety of media.
- Design and lay out various print publications, including:
  - Annual reports
  - Outreach and marketing materials for the Commission in general and for specific divisions and programs within the Commission
  - Other reports, publications and printed materials identified by the Commission.
- Coordinate and manage printing.
- Update the Commission's graphic and brand standards.
- Provide any other graphic design needs the Commission may request within the time and budget scope of the contract.

- **Writing and Content Development**

- With the Communications Director and Commission staff, develop creative themes and provide professionally written content for a wide variety of needs.
- Interview customers and stakeholders and develop interviews into narratives fitting the Commission's needs—for example, stories for the annual report that show the effects of the Commission's programs, social media posts, quotes for promotional materials.
- Conduct research as needed to write clearly and authoritatively about a wide range of subjects that pertain to affordable housing and the work of the Commission.

### **Terms of the Contract**

The term of the contract(s) will be up to three years, from August 2024 through June 2027.

### **Minimum Qualifications**

Successful contractor(s) will have experience in the performance of similar work, in compliance with Commission requirements, and be licensed to do business in Washington state.

### **Contract Deliverables**

The Commission expects to receive the following deliverables from the contractor(s):

1. Creative services provided consistently within negotiated periods and costs.
2. Professional services by qualified personnel.
3. Responsiveness to the Commission's requests and needs for each project.
4. Professional quality and a high degree of creativity on all projects.
5. All copy, design, logos, graphic icons, photos, videos and/or subsequent products become the exclusive property of the Commission, without qualification.
6. A collaborative and dynamic working relationship.

### **Contractor Reporting**

The contractor(s) will be expected to meet on a periodic basis with Commission staff to report on progress toward completing any specific projects under the contract. Regular reports on progress will also be required, as specified in the contract.

### **Method and Schedule of Contract Payment**

The contractor(s) will be paid during the contract according to an established schedule and completion of specified tasks as outlined in the final contract. The contractor(s) will submit a request for payment in the form and method specified by the Commission in accordance with state requirements. Not less than 20 percent of the contract amount will be withheld by the Commission for final payment until all work is completed to the Commission's satisfaction.

### **RFP and Contract Timeline**

RFP Released	July 1
Bidders Conference	July 10
First Q&A Posted	July 10
<b>Proposals Due</b>	July 31
Contractor Interviews start:	Week of August 19
Notification of winning firm(s):	Week of August 26
Anticipated Contract(s) Start Date:	by September 16

## **Questions and Answers**

The bidders conference will be the first opportunity for potential bidders to ask questions regarding this following the bidders conference, questions regarding this RFP that have not been previously answered may be submitted to Anna Porkalob at [anna.porkalob@wshfc.org](mailto:anna.porkalob@wshfc.org). All questions and responses will be posted on the [wshfc.org](http://wshfc.org) website for all potential bidders to see. The online Q&A document will be updated regularly as new questions are submitted.

## **Criteria for Evaluating Proposals**

A review committee will evaluate the proposals according to these principal considerations:

1. Quality and clarity of the proposal.
2. Experience in developing communications strategies and/or creative materials from concept through completion.
3. Quality of work and degree of creativity.
4. Experience and background of staff assigned to the contract.
5. Fit with the goals and audiences of the Commission.
6. Project management skills and responsiveness.
7. The contractor's qualifications and ability to perform the services detailed in this RFP, as evidenced by previous work, other references, and the submitted proposal.

The Commission reserves the right to award this contract to the firm or firms which will best meet these requirements. The Commission reserves the right to reject any or all proposals prior to execution of the contract, with no penalty to the Commission. All respondents will be notified by email, whether they are selected for consideration or not.

## **ORAL INTERVIEWS MAY BE REQUIRED**

Written submittals and oral interviews, if considered necessary, will be utilized in selecting the winning proposal. The Commission, at its sole discretion, may elect to select the top-scoring finalists from the written evaluation for an oral presentation. The oral presentation will determine the apparently successful proposer. Commitments made by a consultant at the oral interview, if any, will be considered binding.

## **COSTS TO PROPOSE**

The Commission will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

## **DEBRIEFING OF UNSUCCESSFUL CONSULTANTS**

Only consultants who have submitted a proposal under the criteria established by the Commission may request a debriefing. The request for a debriefing must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Bidder Letter is e-mailed to the bidder. The debriefing must be held within three (3) business days of the request.

Discussion will be limited to a critique of the requesting consultant's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person, in a virtual meeting or over the phone and will be scheduled for a maximum of one hour.

## **PROTEST PROCEDURE**

This procedure is available to consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the consultant is allowed three (3) business days to file a protest of the solicitation with the RFP Coordinator. Protests must be submitted by email and must be followed by the original document. Bidders protesting this solicitation must follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to bidders under this solicitation.

All protests must be in writing and signed by the protesting party or authorized Agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested must also be included. All protests will be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of an evaluator.
- Errors in computing the score.
- Non-compliance with procedures described in the procurement document or Commission policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address such issues as: (1) an evaluator's professional judgment on the quality of the proposal, or (2) the Commission's assessment of its own and/or other agencies' needs or requirements.

Upon receipt of a protest, a protest review will be held by the Commission. The Director of the Commission or an employee delegated by the Director who was not involved in the procurement will consider the record and all facts available and issue a decision within five (5) business days of receipt of the protest unless additional time is required, in which case the protesting party will be notified by the Commission.

In the event a protest may affect the interest of another consultant that submitted a proposal, such consultant will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold the Commission’s action; or
- Find only technical or harmless errors in the Commission’s solicitation process and determine the Commission to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide the Commission options which may include:
  1. Correct the errors and re-evaluate all proposals and/or
  2. Reissue the solicitation document and begin a new process, or
  3. Make other findings and determine other courses of action as appropriate.

If the Commission determines that the protest was without merit, the Commission will enter into a contract with the apparently successful contractor. If the protest is determined to have merit one of the alternatives noted in the preceding paragraph will be taken.

### **Commission Support for the Contractor**

The Communications Director will assist in coordinating the work of the contractor with the Commission staff and other persons as required for the completion of the contract. The Communications Director will work with the contractor to complete the work program in a timely manner as required by the contract. Contractor is expected to provide their own materials and facilities necessary to complete the projects under this contract.

### **Contact**

All contact with the Commission by respondents to this Request for Proposals will be through:

**Anna Porkalob, Communications Specialist**

**Phone: (206) 464-7139**

**[anna.porkalob@wshfc.org](mailto:anna.porkalob@wshfc.org)**

### **Instructions for Submitting Proposals**

Submit proposals to Anna Porkalob by 5:00 p.m. PST, Wednesday, July 31, 2024, at [anna.porkalob@wshfc.org](mailto:anna.porkalob@wshfc.org). Late proposals will not be considered.

### **Proposals must be organized as follows:**

- I. **Cover letter** (limit: 2 pages)
- II. **Attachment I:** Applicant Questionnaire (limit: 2 pages)
- III. **Attachment II:** Experience, Services Proposed, Examples, Personnel, and Costs

**Page limits:** Pages must be letter-sized, with single-spaced text no smaller than 11 point.



## ATTACHMENT I

### REQUEST FOR PROPOSALS

#### Washington State Housing Finance Commission

#### APPLICANT QUESTIONNAIRE (limit: 2 pages)

- A. Name of the legal entity with which the contract is to be written.
- B. Names of the legal entities to be used as subcontractors (if applicable).
- C. Name, address, email and telephone of the principle officer of the applicant and subcontractor (if applicable).
- D. The legal status of the organization (contractor and subcontractors).
- E. Employer identification number.
- F. Washington State tax registration number (contractor and subcontractor).
- G. If the State of Washington engaged the contractor or subcontractor within the past 24 months, indicate the contract number and/or any other information available to identify the engagement.
- H. The location of the facility from which the contractor and subcontractors would operate.

## ATTACHMENT II

### EXPERIENCE, PERSONNEL, METHODOLOGY and COSTS

#### A. Experience

1. In up to three pages, please describe:

- The general qualifications of your firm and the core team of staff proposed to work on this contract.
- Your experience with public entities.
- Your experience (including lived experience) in diversity, equity and inclusion, especially in communicating with diverse audiences and historically marginalized communities.
- Your approach to project management. Please describe tools, processes, and practices you use to lead projects and collaborations.

#### B. Proposed Services

Please indicate in which areas of communications you would like to propose your services. For each area selected, please describe your specific experience and expertise in **one to two pages**.

If relevant to your proposed services, please describe how you ensure that a range of voices are included in developing communication strategies and materials so they are effective with their intended audiences.

	<p><b>Overall communications strategy, planning and support:</b></p> <ul style="list-style-type: none"> <li>○ Describe your experience/expertise supporting internal communications teams to develop and implement communications strategy.</li> <li>○ Describe your experience/expertise in crisis communications, planning and support.</li> </ul>
	<p><b>Marketing and branding strategies and implementation:</b></p> <ul style="list-style-type: none"> <li>○ Describe your experience/expertise developing marketing strategies; analyzing/conducting market research; working with creative staff to develop ads and materials; and running ad campaigns.</li> </ul>

	<p><b>Community outreach and engagement with diverse communities:</b></p> <ul style="list-style-type: none"> <li>○ Describe your experience/expertise conducting outreach to and engaging with marginalized groups and communities of color across Washington.</li> <li>○ Describe your experience/expertise supporting companies/agencies in their community engagement efforts.</li> </ul>
	<p><b>Graphic design and layout:</b></p> <ul style="list-style-type: none"> <li>○ Describe your creative approach and tools you use, including what you feel are your greatest strengths.</li> <li>○ Describe and show examples of projects that illustrate your skills.</li> </ul>
	<p><b>Writing and content development:</b></p> <ul style="list-style-type: none"> <li>○ Describe your approach to developing written content for a client, especially about unfamiliar topics.</li> <li>○ Describe and show examples of projects that illustrate your skills.</li> </ul>
	<p><b>Photography:</b></p> <ul style="list-style-type: none"> <li>○ Describe your creative approach to a photography shoot and how you interact with photo subjects.</li> <li>○ Describe and show examples of projects that illustrate your skills.</li> </ul>
	<p><b>Videography and video editing:</b></p> <ul style="list-style-type: none"> <li>○ Describe how you work with clients to develop scripts, storyboards, visual style, etc.</li> <li>○ Describe and show examples of projects that illustrate your skills.</li> </ul>

### C. Examples

In **one to two pages**, please give **at least one example** of relevant work performed in the areas you chose above during the past two years. **Examples from previous years can be added if relevant.** Feel free to attach documents or include links.

Please include the following:

- Name of the entity
- Date of engagement
- Person to whom you were responsible
- Personnel from your firm who worked on the engagement
- Indicate if we can contact this firm/individual as a reference.

## D. Costs

1. **Rate:** Provide an hourly (or other time period if applicable) rate for each kind of work you are proposing to provide. An average is acceptable for similar work, for example strategic messaging done by multiple staff.
2. **Subcontractor(s):** Describe any subcontractors or partners on whom you expect to rely to complete projects under this contract, what specific work they would perform in relation to the Commission, and their hourly (or other applicable) rate.
3. **Project estimates:** For each area in which you are proposing your services, choose one project below and estimate the number of hours that you would expect to spend and their associated cost.

The example projects are intended to give us a basis of comparing your costs with those of other proposers, as well as an idea of how you might approach such a project.

Include the kind of work performed, especially if the hourly rate is different (for example, 10 hours graphic design, 3 hours project management, 7 hours production, and so on) and include cost per hour. A range of hours is acceptable as long as not too wide (i.e., 5-8 hours, not 5-20 hours).

It is not necessary to include estimates of travel costs. Contractors would be required to use state reimbursement rates as set by the WA State Office of Financial Management website ([Click here to visit.](#))

- Communications strategy:
  - Develop a communications strategy for rolling out a new strategic plan to external audiences.
- Marketing/Branding:
  - Develop a brand and marketing plan for a new downpayment assistance program.
- Community Engagement and Outreach:
  - Facilitate a community focus group around a new multifamily development policy and provide the Commission with a report of the findings. Assume a two-hour meeting with 40 participants.
  - Develop and implement a survey of residents across five affordable apartment properties in the Commission's portfolio, then analyze results and provide communications recommendations. Assume a total of 500 units and that resident languages include English, Spanish and Vietnamese.
- Graphic Design and Writing:

- Graphic design of a 16-page annual report for the Commission. Assume you are provided with all necessary images and printing costs are separate.
  - Graphic design and production of a one-page flyer promoting a new Commission homeownership program.
  - Writing a 300-word profile of a new apartment building, including interviews with a resident and the developer.
- Photography and Videography:
    - Photo shoot of a family who recently bought a home using the Commission's home-loan program, to be used in the annual report and other promotional materials. Include photo editing and delivery of ready-to-use images.
    - Video shoot of a family who used the Commission's Beginning Farmer/Rancher program to buy land and start their own farm. Assume the shoot will take place in one afternoon and the finished video will be 2 minutes long. Include editing and anything else that would be required to submit a finished video that the Commission could post on its website.

## **CONTRACT GENERAL TERMS AND CONDITIONS**

The successful applicant will be expected to enter into a contract generated by the Commission in accordance with guidelines provided by the State of Washington, including its general terms and conditions and other standard provisions customary to such contractual agreements. In no event is the applicant to submit its own standard terms and conditions in response to this procurement. The applicant may submit exceptions to the general terms and conditions. The Commission will review requested exceptions and accept or reject the same in its sole discretion.

### **Insurance Coverage**

The selected contractor is to furnish the Commission with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The contractor shall, at its own expense, obtain and keep in force insurance coverage that shall be maintained in full force and effect during the term of the contract. The contractor shall furnish evidence in the form of a Certificate of Insurance that insurance has been provided, and a copy shall be forwarded to the Commission within fifteen (15) days of the contract effective date.

### **Liability Insurance**

Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the “each occurrence” limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the “each occurrence” limit. All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract) and contain separation of insured’s (cross liability) condition.

Additionally, the contractor is responsible for ensuring that any sub-contractors provide adequate insurance coverage for the activities arising out of subcontracts. In the event that services delivered pursuant to this contract involve the use of vehicles, either owned or unowned by the contractor, automobile liability insurance shall be required. The minimum limit for automobile liability is \$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage.

The insurance required shall be issued by an insurance company/ies authorized to do business within the state of Washington, and shall name the state of Washington, its agents and employees as additional insureds under the insurance policy/ies.

All policies shall be primary to any other valid and collectable insurance. Contractor shall instruct the insurers to give the Commission thirty (30) calendar days advance notice of any insurance cancellation.

Contractor shall submit to the Commission within fifteen (15) calendar days of the contract effective date, a certificate of insurance that outlines the coverage and limits defined in the Insurance section. Contractor shall submit renewal certificates as appropriate during the term of the contract.

## **Employers Liability (“Stop Gap”) Insurance**

In addition, the contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

## **Additional Provisions**

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The Washington State Housing Finance Commission, its elected and appointed officials, agents, and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with the contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the Commission.
2. **Cancellation.** Washington State Housing Finance Commission shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the State forty-five (45) days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the State shall be given ten (10) days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The State shall be given twenty (20) days advance notice of cancellation. If cancellation is due to non-payment of premium, the State shall be given ten (10) days advance notice of cancellation.
3. **Identification.** Policy must reference the State’s contract number and the agency name.
4. **Insurance Carrier Rating.** All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best’s Reports. Any exception shall be reviewed and approved by Washington State Housing Finance Commission. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with Chapter 48.15 RCW and 284-15 WAC.
  4. **Excess Coverage.** By requiring insurance herein, the State does not represent that coverage and limits will be adequate to protect contractor, and such coverage and limits shall not limit contractor’s liability under the indemnities and reimbursements granted to the State in this contract.

## **Worker’s Compensation Coverage**

The Contractor will at all times comply with all applicable workers’ compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable.