



## Maine State Housing Authority

### Request for Proposals from Marketing Agencies/Individuals

#### SCHEDULE

Issued: February 3, 2020

Deadline for Questions: February 11, 2020

Deadline for Submitting Proposals: February 28, 2020 at 5:00 p.m. ET

MaineHousing Contact Person: Cara Courchesne, Communications Coordinator

E-mail: [ccourchesne@mainehousing.org](mailto:ccourchesne@mainehousing.org)

Phone: (207) 626-4600

*Maine State Housing Authority ("MaineHousing") does not discriminate on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, marital status, national origin, ancestry, physical or mental disability, age, familial status or receipt of public assistance in the admission or access to or treatment in its programs and activities. In employment, MaineHousing does not discriminate on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, national origin, ancestry, age, physical or mental disability or genetic information. MaineHousing will provide appropriate communication auxiliary aids and services upon sufficient notice. MaineHousing will also provide this document in alternative formats upon sufficient notice. MaineHousing has designated the following person responsible for coordinating compliance with applicable federal and state nondiscrimination requirements and addressing grievances: Louise Patenaude, Maine State Housing Authority, 353 Water Street, Augusta, Maine 04330-4633; 1-800-452-4668 (voice in state only), (207) 626-4600 (voice), or Maine Relay 711.*

**APPLICANT INFORMATION SHEET**  
**for Maine State Housing Authority**  
**Request for Proposals for Marketing Agencies/Individuals**

Provide the following information and include this completed and signed Applicant Information Sheet at the front of any proposal.

<b>General Information</b>	
<b>Company Name</b>	
<b>Street Address</b>	
<b>City, State, Zip Code</b>	
<b>General Phone Number</b>	
<b>Toll-free Number (if any)</b>	

<b>Contact Person for Questions</b>	
<b>Name and Title</b>	
<b>Address</b>	
<b>E-mail address</b>	
<b>Phone</b>	

<b>Name, Title and Signature of Individual with Authority to Bind Applicant</b>	
<b>Name</b>	
<b>Title</b>	
<b>Signature</b>	
<b>Date</b>	



**Maine State Housing Authority**  
**Request for Proposals**  
**from Marketing Agencies/Individuals**

**I. Introduction**

**A. Overview**

In this *Request for Proposals from Marketing Agencies/Individuals* (the "Request"), Maine State Housing Authority ("MaineHousing") is inviting professional full-service communications agencies with specific communications strengths in the areas of marketing campaign development, video production, and social media creativity and marketing, to present their qualifications and offer their ideas on how they would energize and build upon our current marketing efforts.

**B. Budget**

MaineHousing has budgeted \$195,000 for a 12-month period towards meeting its marketing and communications objectives.

**C. About MaineHousing**

MaineHousing is an independent quasi-state agency and one of the top mortgage and affordable housing development lenders in the state. The agency is a \$1.8 billion financial institution whose mission is to provide quality housing Mainers can afford.

MaineHousing is an economic engine in the development of affordable housing throughout Maine, and administers several programs that assist Maine people in obtaining and maintaining quality affordable housing and services suitable to their housing needs. On an annual basis, MaineHousing assists more than 90,000 Maine households and invests more than \$300 million in Maine's economy from the sale of tax-exempt revenue bonds, private capital generated by the low income housing tax credit, and federal and state funds.

MaineHousing provides financing to: assist first-time homebuyers; develop affordable rental housing; create housing for people with special needs; provide housing for people who are homeless; and provide low income households with heating assistance, home repair, weatherization, and other home safety modifications. MaineHousing has 13 departments, of which 6 are consumer-services oriented: Asset Management, Development, Energy and Housing Services, Homeless Initiatives, Homeownership, and Housing Choice Voucher programs. Additional information about MaineHousing can be found at [mainehousing.org](http://mainehousing.org).

## **II. Expectations**

### **A. Background**

MaineHousing contracts for professional communications and marketing services to promote the use of specific programs and to inform the public and decision-makers of the state's affordable housing needs. MaineHousing and its marketing partner have managed a successful campaign that has improved public awareness and increased the loan volume of MaineHousing's First Home Loan Program as well as other agency initiatives.

The current contract expires April 30, 2020. MaineHousing's goal is to award a new contract without interruption in our marketing efforts or communications strategy. The new contract will be for one year with the option to renew twice, for two additional, consecutive one-year periods.

### **B. Firm/Individual Qualifications**

The selected agency or agencies/individuals will demonstrate exceptional competency, creativity, and ingenuity in communications and marketing development and strategy. They will also be able to measure and respond to MaineHousing's marketing goals using analytics, and make necessary adjustments to achieve promotion goals. "Applicant" in this Request means any person or entity who may or does submit a proposal in response to this Request.

MaineHousing is seeking highly qualified applicants with expertise in the following areas:

- Social Media Marketing
- Video Production
- Webpage Design
- Design for printed materials, including: reports, brochures, posters, and other promotional materials
- Logo and iconography development
- Online Customer and Partner Engagement
- Information graphics or infographics, graphic visual representations of information, data or knowledge

### **C. Regulatory Knowledge**

Because of the regulatory complexities in the mortgage industry, prior experience in developing marketing strategies for financial services companies, banking institutions, the real estate industry, affordable housing industry, or related trade organizations is preferred. Additionally, the successful applicant will have a working knowledge of changes in online advertising laws and regulations related to the Fair Housing Act, and access to legal advice regarding same if necessary.

### **D. MaineHousing's Brand**

The chosen contractor will agree to use MaineHousing's Style Guide and standards, logos, colors, and program names.

### III. Scope of Work

A. The marketing strategies will be predominantly social media campaign(s) to accomplish the following objectives:

1. Increase the number of First Home Loans through:
  - Reaching prospective first-time homebuyers in areas of Maine where our data shows there is potential market demand;
  - Engaging our partners (co-branding with lenders; promotion for and obtaining testimonials from real estate professionals and recent first-time homebuyers) to reach more prospective first-time homebuyers;
  - Achieving high rates of responses and engagement from our messaging by using the latest marketing trends to reach our audiences;
  - Developing new means of marketing and advertising to reach New Mainers, those who may want to purchase 2-4 unit homes, and other untapped markets;
  - Realizing solid returns on our investments through the efficient use of marketing budget resources.
2. Promote MaineHousing's programs and services in order to increase participation in key, targeted program areas by developing marketing and customer engagement strategies for select MaineHousing's programs.
3. Promote MaineHousing's accomplishments and celebrate our partners' contributions and involvement in order to increase visibility and acceptance in the marketplace.

#### B. **First Home Loan Program**

##### ❖ **Background**

MaineHousing offers mortgage programs to serve first-time homebuyers in Maine. First-time homebuyers include those who have not owned a home in the last three years. The first-time homebuyer requirement is waived for veterans, retired military, and active duty military personnel who are buying a home. The first home market is predominately individuals ages 24-37.

MaineHousing mortgages are funded by tax-exempt mortgage revenue bonds, not with taxpayer money received from the state.

Income limits and home purchase price limits do apply, and can vary by location. Additional mortgage program features [can be found here](#).

### ❖ **Partners – in Business and Promotion**

Our partners in this program include lenders and real estate professionals. We are looking for unique ways to include them in our marketing efforts.

**Lenders:** We work with approximately 40 lenders across Maine who originate our First Home Loan program. Over the last few years, we recognized high performers in various ways and want to do so again.

**First Home Finders:** We recognize real estate professionals who have sold three or more homes in the previous year using our First Home Loan program as First Home Finders. We wish to decide if we want to continue with this designation or try another approach.

**First-Time Homebuyers:** Over 2,300 people purchased their first home with our First Home Loan over the last two years. Our objective is to engage them to promote the program to their friends, colleagues, and family.

### ❖ **Marketing and Promotion Objectives**

The selected Applicant will expand on our First Home Loan consumer awareness campaign, including the continued promotion of our partners. The work includes:

- National Homeownership Month campaign, which begins June 1. This is our top priority.
- Digital slideshows, animations, and videos that instruct, engage, or provide testimonials.
- Promotion that encourages engagement.
- Engagement of our partners to promote the First Home Loan program.
- Homebuyer education awareness and success.

This contract will also include similar support for work related to a number of our other programs, including but not limited to the Home Energy Assistance Program (HEAP) and others.

## **IV. Demonstration of Qualifications**

### **A. Strengths and Suggestions**

The applicants must include the following in their application:

- Availability immediately upon selection to create and launch a promotion for National Homeownership Month in June.
- A review of MaineHousing's website and current social media platform use (Facebook, Instagram, and Twitter), and a presentation of preliminary ideas and suggestions for greater brand awareness.

- A discussion of MaineHousing's unique benefits as compared to other mortgage products or banks.
- A demonstration of creative use of lower-cost marketing tools that have the potential to reach our targeted audiences.
- A demonstration of creativity and innovation to reach different audiences or use different communication and marketing methods.
- A demonstration of the ability to be both proactive and reactive when meeting deadlines, updating ad campaigns to ensure optimum results, and responding to MaineHousing's marketing needs.
- Work samples from previous contracts or ideas that demonstrate the ability to meet our marketing objectives and needs.

In the proposal, please:

- Indicate what services would be performed in house.
- Indicate any work subcontracted and provide the name, address, phone numbers, and other information about any subcontractor.

In the proposal, please describe the capacity and experience with the following, including success stories of achieved results:

- Advertising
  - Social media advertising and messaging (Facebook, Twitter, Instagram, YouTube, other)
  - Applications advertising (mobile, games, other)
  - Media sites (TV, radio, print, real estate sections)
  - Real estate-specific products or sites (Realtor.com, MLS, Zillow, other)
  - Others as appropriate
- Search engine optimization
- Mobile apps
- Partner co-branding (lenders, realtors, veterans, trade organizations, other)
- Trade shows, conferences, forums, meetings
- Collateral materials (brochures, rack cards, posters, etc.)
- Others as appropriate

## **B. Fee Structure & Billing**

Applicants must note their fee structure and billing practices, and demonstrate the ability to adjust project costs to meet MaineHousing's needs.

### C. Conflict of Interest

Does the Applicant, any principal or affiliate of the Applicant, or anyone who will be paid for work on the contract have business ties, familial relationships, or other close personal relationships with a current MaineHousing employee or commissioner or anyone who was a MaineHousing employee or commissioner within the past two years?

If yes, describe here: \_\_\_\_\_

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### D. Business References

Applicant must provide a minimum of two (2) business references from private, state and/or large local government clients that received services from applicant similar to those described in this Request within the last three (3) years. Please attach additional pages, if necessary.

Contact Information	
Name:	
Street Address:	
City, State, Zip	
Phone, including area code:	
Email address:	
Services Description	
Brief description of plans and description of services performed.	
Services start and end dates:	
Contact Information	
Name:	
Street Address:	
City, State, Zip	
Phone, including area code:	
Email address:	
Services Description	
Brief description of plans and description of services performed.	
Services start and end dates:	



MaineHousing reserves the right to contact and verify any and all references listed.

## **V. Instructions**

Applications must be submitted as a PDF to Cara Courchesne, Communications Coordinator, via email ([ccourchesne@mainehousing.org](mailto:ccourchesne@mainehousing.org)) no later than 5 pm EST on February 28, 2020. Proposals should be concise and must include all attachments and work samples. The quality and effectiveness of the proposal will be a factor in the decision as to selection of an applicant.

## **VI. Selection Factors**

MaineHousing will review proposals submitted and select up to three firms to make a presentation to MaineHousing's senior staff. Further, the evaluation committee may contact the references provided by applicants; contact any applicant to clarify any response; and obtain information from any available source concerning any aspect of a proposal.

Review will begin immediately, and interviews will take place during the month of March. MaineHousing intends to select the proposal that provides the best value in meeting MaineHousing's business objectives identified in this Request by considering the following factors: Applicant experience and success with the services offered; timing; and price. MaineHousing will also take into account the detail and completeness of proposals.

Applicants should note that the evaluation committee is not required to ask for clarifications or information that is essential for a complete and thorough evaluation of applicant proposals. Therefore, all proposals should be complete when submitted.

Subject to the reservation of rights and the other terms and conditions of this Request, MaineHousing will select the applicant whose proposal is most advantageous to MaineHousing, taking into account the selection factors in this Request. Any award is contingent on successful negotiation of the final contract terms. In no event will any claimed obligations of any kind be enforceable against MaineHousing unless and until MaineHousing and the selected applicant enter into a written contract. This Request and the successful applicant's proposal, as may be modified pursuant to this Request, will be incorporated by reference into and be part of any contract between MaineHousing and the applicant.

## **VII. General Terms and Conditions**

### **A. Review and Compliance**

It is the responsibility of each Applicant to review this entire document, including attachments, and comply with all requirements of this Request.

### **B. Questions and Clarifications**

All questions, including requests for clarification, must be submitted by e-mail to **Cara Courchesne, Communications Coordinator**, at [ccourchesne@mainehousing.org](mailto:ccourchesne@mainehousing.org) no later than **February 11, 2020**. MaineHousing will respond to questions that MaineHousing deems relevant and material to this Request. Any responses provided by MaineHousing to

questions from Applicants will become part of this Request, and will be posted on our website by February 18, 2020.

**Please Note:** Applicant contact with any MaineHousing employee or other MaineHousing representative concerning this Request other than the MaineHousing contact person named on the cover page may be grounds for rejection of Applicant's proposal.

#### **C. Proposal Valid for 45 Days**

All proposals submitted by Applicants and received by MaineHousing will be treated as offers to contract. An Applicant's proposal must remain open from the time of receipt of the proposal by MaineHousing through a minimum of 45 days after the date of Applicant's service demonstration pursuant to this Request and may not be unilaterally modified by Applicant during that period. Alterations, modifications or variations of a proposal after the submission deadline will not be considered by MaineHousing unless authorized by an amendment or addendum to this Request issued by MaineHousing. In the case of any award pursuant to this Request, the awarded Applicant must keep in effect all proposal terms, including pricing, throughout any contract negotiations.

#### **D. Contract Term**

The initial term of any contract awarded pursuant to this Request will be one year (1) year from the date the contract is executed by Applicant and MaineHousing. MaineHousing will have the sole right and option to extend the contract for two additional terms of one (1) year each for up to three years, after annual performance review.

#### **E. Costs of Proposal Development**

Costs of developing and delivering proposals pursuant to this Request and providing service demonstrations are solely the responsibility of Applicants. MaineHousing is not liable for any expense incurred by Applicants in the preparation, delivery or presentation of their proposals or in connection with any service demonstrations.

#### **F. Proposal Materials**

All proposals submitted, including all items and materials submitted as part of the proposals, become the property of MaineHousing, whether or not selected. Proposal materials may be appended by MaineHousing to any contract between MaineHousing and the Applicant providing such materials.

#### **G. Completed Works**

All works created by the successful bidder under this Request shall be considered works made for hire for MaineHousing and shall be the exclusive property of MaineHousing. Materials created for this campaign (ads, videos, scripts, pictures, messages, print, style elements, and other items) in any software format will be provided to MaineHousing. The successful Applicant may keep copies of such work to be used for the sole purpose of

displaying it to prospective clients as a work example or for other purposes as may be approved in advance by MaineHousing in writing. The successful bidder shall include the phrase “Copyright © (\_\_\_\_) MaineHousing”, with the applicable year of creation inserted in the blank, in or on all such works.

#### **VIII. Rights Reserved by MaineHousing**

In addition to the rights reserved by MaineHousing elsewhere in this Request, MaineHousing reserves the right:

- To adjust the timetable for this Request as deemed necessary.
- To waive informalities and minor irregularities in proposals received.
- To reject and not consider any or all Applicants who do not meet the requirements of this Request, including but not limited to incomplete responses and/or non-responsive proposals.
- To reject any or all proposals received and not to award a contract pursuant to this Request, or to cancel or terminate this Request process at any time, whether before or after any proposals have been submitted or received, if deemed by MaineHousing to be in its best interest.
- To negotiate price or other factors included in any proposal submitted to MaineHousing, and in the event MaineHousing is unable to negotiate a mutually satisfactory contract with the successful Applicant under this Request, to, in its sole discretion, negotiate with another Applicant or cancel this Request and not award a contract to any Applicant.
- To reject the Applicant selected pursuant to this Request and to offer a contract to another Applicant in the event the selected Applicant does not enter into the required contract.
- To negotiate directly with one Applicant if the responses to this Request demonstrate a lack of competition.
- To correct or amend this Request. In no case will this Request be amended within seven (7) days of the proposal submission deadline unless the amendment includes an extension of time. MaineHousing will not be liable for any costs incurred as a result of changes to this Request.

#### **IX. Additional Terms and Conditions**

##### **A. Confidentiality and Nondisclosure**

Applicant shall maintain in trust and confidence and shall not disclose to any third party, except as such disclosure may be authorized in writing in advance by MaineHousing, and shall not use for any unauthorized purpose, any and all information, documents and data received or obtained from or on behalf of MaineHousing. Applicant may use such information, documents and data only to the extent required for the purposes described in this Request. Applicant shall adhere to all security, confidentiality and nondisclosure policies

and procedures required by MaineHousing for the protection of such information and data from unauthorized use and disclosure and from loss.

**B. Maine Freedom of Access Act**

Information submitted by an Applicant in any proposal becomes public information, and is subject to disclosure in accordance with the requirements of law, including without limitation the Maine Freedom of Access Act, 1 M.R.S.A. Section 401 et seq. ("FOAA"), except as provided therein. Applicant acknowledges that MaineHousing is required to comply with FOAA.

**X. Protest Procedures**

Protests of any award made pursuant to this Request must be submitted in writing to MaineHousing at the address given on the cover page of this Request, to the attention of: Deputy Director. To be considered, protests must be received by MaineHousing within fifteen (15) calendar days from the date of notification of the contract award and provide specific reasons and any supporting documentation for the protest.

**APPENDIX A**  
**APPLICANT CERTIFICATION FORM**

<b>Applicant Name</b>	
<b>Applicant Address</b>	

**The undersigned Applicant represents and certifies as follows:**

1. The prices in this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other Applicant or potential Applicant.
2. No attempt has been made at any time to induce any firm or person to submit any intentionally high or noncompetitive proposal or to otherwise submit or refrain from submitting a proposal for the purpose of restricting competition.
3. Applicant has not given, and will not give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to any employee or representative of MaineHousing in connection with this Request.
4. Applicant acknowledges that MaineHousing will determine whether a conflict of interest exists and that MaineHousing reserves the right to disqualify any Applicant on the grounds of actual or apparent conflict of interest.
5. Applicant has not employed or retained any person or entity to solicit or obtain any contract resulting from this Request and has not paid or agreed to pay to any person or entity any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of any such contract.
6. Applicant understands and acknowledges that the representations in its proposal are material and important and will be relied on by MaineHousing in evaluating the proposal. Applicant certifies that, to the best of its knowledge, all of the information contained in its proposal is true, correct and complete and acknowledges that any intentional misrepresentation by Applicant will disqualify Applicant from further consideration in connection with this Request.
7. The undersigned individual is legally authorized to sign this Applicant Certification Form for and on behalf of Applicant and to bind Applicant to the statements made herein.

<b>Name, Title and Signature of Individual with Authority to Bind Applicant</b>	
<b>Name</b>	
<b>Title</b>	
<b>Signature</b>	
<b>Date</b>	