



Request for Qualifications Specialized Public Relations and Marketing Expertise

1. SUMMARY

NCB Capital Impact is accepting proposals to provide a range of public relations and marketing services for our shared equity homeownership initiative. This will be a concept to completion production. The purpose of this RFQ is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which they will be judged.

2. GUIDELINES AND REQUIREMENTS

This is an open and competitive process.

Proposals received after 12:00pm/noon EDT, Friday, August 8, 2008, will not be considered and will be returned unopened.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.

The price you quote should be inclusive. Include fees and out of pocket expenses. If your price excludes certain fees or expenses, you must provide a detailed list of excluded costs with a complete explanation of the nature of those costs.

If the execution of work to be performed by your company requires the hiring of sub-contractors you must clearly state this in your proposal.

3. CONTRACT TERMS

NCB Capital Impact will negotiate contract terms with its preferred vendor based upon the vendor's response to this RFQ and a subsequent interview. All contracts are subject to review by NCB Capital Impact legal counsel, and a project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

4. PURPOSE, DESCRIPTION, AND OBJECTIVES

Purpose

NCB Capital Impact is currently undertaking a major national initiative to encourage and expand shared equity approaches to affordable homeownership in cities around the country. Shared equity homeownership balances individual wealth accumulation with preservation of public subsidies, creating positive outcomes for homeowners while minimizing public expenditures. An opportunity exists to introduce these innovative models and tools to policymakers at the state and local level who are faced with the significant challenges of the current housing market. A professionally managed outreach campaign to state and local government agencies will be essential to the success of this initiative.

Description

Create a comprehensive public relations strategy targeted to state and local policymakers. This campaign should be informational and accessible, and appeal to a range of government agencies and policy makers. We must develop marketing products that deliver large amounts of information to our key audiences while maintaining a user-friendly approach which highlights the relevance of shared equity homeownership and our products and services to solving their affordable housing problems.

Objective

Our primary objective is to introduce shared equity homeownership models and our services to state and local policymakers across the country, and solicit interest in future collaborations.

Strategy

In short, we seek to tell our story through the use of compelling visuals and concise messaging.

Make it easy

Create an accessible source of information detailing the benefits for a municipality or government agency of adopting a shared equity homeownership program.

Make it compelling

Develop tools to deliver timely, relevant answers to the breadth and depth of potential client questions.

Make it happen

Reinforce NCB Capital Impact's brand and market leadership and give the prospective client incentive to take action.

5. TIMELINE

One of the nation's leading foundations has invited NCB Capital Impact to apply for a major grant. The grant will include this work among several other components. We would like to include one or more of the top submissions we receive as part of our grant application. The contract work will not be divided, however, and no contract will be negotiated until the grant funds are disbursed. We expect to have the grant funds in hand by early 2009.

⌚ This RFQ is dated July 14, 2008. Proposers may also request a copy be sent via email by contacting Jim Gray at jgray@ncbcapitalimpact.org.

⌚ Proposals are due no later than 12:00pm/noon EDT, Friday, August 8, 2008.

- ⌚ Proposals will be evaluated immediately thereafter. Those proposers who have been selected for interviews will be notified by August 22, 2008.
- ⌚ Interviews will be conducted shortly thereafter.
- ⌚ The name of the candidate firm or firms who will be referenced in the grant application will be decided on or about September 10, 2008.
- ⌚ All other candidates will be notified on or about September 12, 2008.
- ⌚ The final selection process will be determined and the contract will be negotiated once the grant funds are received, in early 2009.

6. AUDIENCE

Stakeholders and audience groups:

Primary:

State and local government policymakers including mayors, city managers, and council members; directors of municipal agencies including Housing Authorities, Housing Finance Agencies, and Offices of Planning; and their related trade associations including the National Council of State Housing Agencies, National Association of Local Housing Finance Agencies, National Association of Housing and Redevelopment Officials, National Governors' Association, National League of Cities, American Planning Association, and the US Conference of Mayors

Secondary:

Lenders, developers, realtors

7. SCOPE

The scope of this project is to create and execute a complete marketing and communications plan for NCB Capital Impact's shared equity homeownership initiative. A firm that can handle all planning, production, and delivery is required. We have drafted the scope broadly, on the assumption that respondents will know better than we do about where we should concentrate our efforts and resources. Please provide an explanation for how and why the stages at which you propose to concentrate resources are the most efficient. We expect that some stages will be particularly critical for trying to reach a relatively small number of high-ranking decision makers, while other stages may be entirely unnecessary or require only minimal effort. Proposals that do not adhere to the following suggested stages will be considered as long as a justification for the alternative process is presented.

Stage 1: Discovery:

Research audiences to determine target contacts and optimal access points. Compile database of prospects.

Stage 2: Communication Design:

Construct message framework and boilerplate language aimed at each sector of the target audience. Propose format and layout of communications pieces.

Stage 3: Dissemination Plan:

Propose methods for distributing information and materials to target audience.

Stage 4: Production:

Develop and produce deliverables.

Stage 5: Implementation:

Distribute products and undertake communications efforts as described above.

Provide detailed timeline for delivery process, including all phases of development and implementation, as well as progress updates to NCB Capital Impact.

Stage 6: Evaluation

Determine success and efficacy of outreach conducted and suggest further targeting and appropriate follow-up.

8. BUDGET

We are interested in getting a reliable approximation of the cost of this work, but we do not expect to receive precise budgets at this stage. Please provide tiered cost proposals, where possible, to complete the stages outlined below. The budget must encompass all design and production necessary for implementation of the outreach campaign.

List detailed pricing for each stage of your proposed plan.

NCB Capital Impact's budget is open and will be determined based on scale recommended to achieve objectives.

9. SUBMISSION ELEMENTS

- 1) Describe how you propose to complete the project and meet the objectives outlined above.
- 2) Describe the breadth and depth of your relationships and contact with the target audience.
- 3) Provide at least 2 samples that your firm has produced that best reflect your work and relevancy to this project. Briefly list the role your firm played in each project.
- 4) Describe your experience in working for non-profit and/or community-focused projects.
- 5) Provide current reference information for three former or current clients.
- 6) Provide us with any relevant information and documentation describing your firm, its organizational capacity and structure, and your employees.
- 7) The timeframe for completion of the project will be evaluated. In addition, time frames will be part of the contractual agreement; therefore, a realistic time frame for completion is requested.
- 8) Terms and conditions.

10. QUESTIONS AND CLARIFICATIONS

There will be a conference call at 3:00 EDT on Tuesday, July 22nd to answer questions and clarify the contents of this RFQ. All firms who are considering responding to this RFQ are invited to participate. To join the call, please dial 1-800-791-2345 and enter participant code 65437.

11. FORMAT

Please use the following as a guideline to format your proposal:

Length and Font Size:

Please use fonts no smaller than 10 point. Maximum proposal length including title page, cover letter, proposal, qualifications and budget should not exceed 35 pages.

Title Page:

NCB Capital Impact, Shared Equity Affordable Homeownership Communications and Marketing Proposal, your company name, address, web site address, telephone number, fax number, e-mail address and primary contact person.

Cover Letter:

Signed by the person or persons authorized to sign on behalf of the company (1-2 pages).

Proposal:

Discuss your proposed solution, including the features, benefits and uniqueness of your solution. You should break down your detailed description of the work you propose into the six stages identified in the scope. You should also touch on your ability to deliver the project in the timeframe noted in Section 5 (3-10 pages).

Qualifications:

Provide the information requested in Section 9 (10-20 pages).

Budget and Fees:

List budgets as requested above. Identify staff you anticipate working on the project and their hourly rates for work that may be needed for each of the six stages.

12. EVALUATION CRITERIA

The following criteria will form the basis upon which NCB Capital Impact will evaluate proposals. The mandatory criteria must be met and include:

Three (3) copies of your proposal must be received no later than 12:00pm/noon EDT, Friday, August 8, 2008. Your proposal must include a cost proposal as described above. All costs associated with the delivery of the project should be presented in a flat rate, fee for service format.

Deliver proposals to the attention of:

Jim Gray
NCB Capital Impact
2011 Crystal Drive.
Suite 800
Arlington, VA 22202

Proposals that meet the requirements, as stated above, will be evaluated using the following criteria:

- ⌚ Suitability of the Proposal – the proposed solution meets the needs and criteria set forth in the RFQ.
- ⌚ Expertise in recommending and communicating appropriate technical and aesthetic solutions as evidenced by the proposal and references.
- ⌚ Aesthetic Capabilities – Prior work demonstrates artistic and innovative, user friendly designs that engage communities and viewers.
- ⌚ Candidate Experience – Candidate has successfully completed similar projects and has the qualifications and contacts necessary to undertake this project.
- ⌚ Value/Pricing Structure and Price Levels – The price is commensurate with the value offered by the proposer. As a non-profit institution, NCB Capital Impact is able to accept pro bono service and recognize the provider to the full extent allowed by the Internal Revenue Service.
- ⌚ Depth and Breadth of Staff – The candidate firm has appropriate staff to develop the project in the time frame needed.
- ⌚ Proposal Presentation – The information is presented in a clear, logical manner and is well organized.

13. BACKGROUND OF ORGANIZATION

NCB Capital Impact, an affiliate of NCB, is a national nonprofit organization that empowers America's underserved communities to progress. NCB Capital Impact creates access to capital and expert technical assistance otherwise unavailable for low- and moderate-income communities, often dealing with higher credit risk while maintaining financial strength. NCB Capital Impact combines both financial and development services to spark systemic change for delivering affordable facilities to communities including housing, health care, assisted living, education and economic development ventures. NCB Capital Impact has over 100 employees, \$13 million in annual revenue, and unrestricted net assets of \$71 million.

Our Mission

NCB Capital Impact's mission is to provide solutions, based on cooperative principles, that empower underserved communities to address the problems poverty creates in America.

Our Work

Our programs target areas in which we can profoundly influence the lives of individuals and families in underserved communities: affordable housing, affordable assisted living, health care, education and economic development. Over the course of its twenty-year history, NCB Capital Impact, in collaboration with our partners, has created 32,500 units of affordable housing; 15,000 jobs for low-income individuals; 61,000 new school seats; 2.3 million square feet of community health center space serving 350,000 patients annually; and more than 7,500 units of affordable assisted living. To achieve these results, we provide technical assistance, training, policy advocacy, and predevelopment capital for experienced non-profit organizations. This work has received significant media coverage, including a front-page article in the Wall Street Journal on June 24, 2008 covering the successes of the Green House project.

NCB Capital Impact is well equipped to bring multi-family homeownership within reach of low to moderate-income families. In over 25 years of operation, NCB Capital Impact and our affiliate, NCB, have financed over \$500 million supporting development of 30,000+ units of affordable housing.

Historically, we achieved this goal primarily through cooperative housing, but we have modified our approach to reflect the changing market. Now, we promote a variety of shared equity strategies to help many families take their first steps towards homeownership. These paths can lead to home ownership opportunities for those otherwise unable to afford to buy. In exchange for this opportunity, the new homeowner agrees that when they sell in the future, they will receive only a portion of the equity appreciation. This will allow homeowners to generate real wealth while keeping the property affordable and enabling future buyers the opportunity for homeownership.

The hot, speculative real estate market earlier this decade created an environment in which many people bought homes they could not afford. This trend created strong interest in home buying strategies that allow people to purchase housing they can afford and keep over the long term. The current foreclosure crisis has created an even stronger rationale for Shared Equity Homeownership. The goal is to help families become first time homebuyers or to keep their homes and provide safe alternatives to the risky loan products that led to the current problems. Shared equity homeownership will also create a stable supply of housing to help reduce the effects of cyclical downturns in housing markets. For further information about shared equity homeownership, please see the attached document and visit our website:

<http://www.ncbcapitalimpact.org/default.aspx?id=534>