

## 1. Summary

Woodstock Institute is accepting proposals to produce a short (8-10 minutes) video to celebrate our 40<sup>th</sup> anniversary as an organization and share at our 40<sup>th</sup> Anniversary Research Symposium and Bash. The purpose of this RFP 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. Proposal guidelines and requirements

This is an open and competitive process.

Proposals received after 5:00pm on Friday, March 22, 2013 will not be considered.

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

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

Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

## 3. Contract terms

Woodstock Institute will negotiate contract terms upon selection. All contracts are subject to review by Woodstock Institute 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**

On October 2-3, 2013, Woodstock Institute will hold a research symposium and bash to celebrate 40 years of applied research and policy advocacy on fair lending, wealth creation, and financial reform issues to advance economic security and community prosperity for low-wealth people and communities of color. Woodstock requires the services of a professional videographer to create a short video featuring Woodstock's successes, organizational history, and interviews with past and current stakeholders. All content created throughout the agreement will become the sole property of Woodstock Institute.

### **Description**

Work with Woodstock staff to create a visually engaging video to celebrate Woodstock's 40<sup>th</sup> anniversary and share at our Research Symposium and Bash.

### **Objective**

Our primary objective is to create a video that will provide a comprehensive history of Woodstock, demonstrate some of our achievements, and share it with attendees at the 40<sup>th</sup> Anniversary Research Symposium.

### **Specific Strategies**

- Consistently implement existing Woodstock visual style guide
- Interview Woodstock staff, board members, partners, policymakers, and funders, both past and present
- Highlight Woodstock's successes, research, and impact on our community

## **5. Production Timeline**

- This RFP is dated Monday, February 25, 2013.
- Proposals are due no later than March 22, 2013 at 5:00 pm CT.
- Proposals will be evaluated immediately thereafter. During this time we may require interviews at our office around March 25, 2013. You will be notified if this is requested.
- The candidate who has been selected will be decided no later than March 27, 2013.
- Negotiations will begin immediately with the successful candidate and should conclude no later than March 29, 2013.
- All other candidates will be notified on or about April 3, 2013.
- Expectations for completion of project deliverables:
  - Discovery: April 2-4, 2013
  - Outline of video: April 8-12, 2013
  - Conduct 6-10 interviews: May-June, 2013
  - Editing of video, including staff feedback: July-August, 2013
  - Final DVDs and files to Woodstock: September 1, 2013

## **6. Budget**

Please provide several cost proposals to accomplish the scope outlined below. The budget must encompass all planning, shooting, production, and software/hardware acquisitions necessary for development of the video.

Woodstock Institute has allocated up to \$10,000 for this project.

## **7. Background of Organization**

### **Our Vision**

A just society in which everyone has an equal opportunity to achieve economic security and community prosperity and a just financial system in which everyone-- including lower-wealth persons and communities, and people and communities of color-- can safely and sustainably borrow, save, and build wealth.

### **Our Mission**

Create a just financial system in which lower-wealth persons and communities and people and communities of color can achieve economic security and community prosperity.

### **Who We Are**

Woodstock Institute is a leading nonprofit research and policy organization in the areas of fair lending, wealth creation, and financial systems reform. Woodstock Institute works locally and nationally to create a financial system in which lower-wealth persons and communities of color can safely borrow, save, and build wealth so that they can achieve economic security and community prosperity. Our key tools include: applied research; policy development; coalition building; and technical assistance. Woodstock Institute has been a recognized economic justice leader and bridge-builder between communities and policymakers in this field since it was founded in 1973 near Woodstock, Illinois. Now based in Chicago, we work with community and philanthropic groups, financial institutions, and policymakers. Funded by foundation grants, consulting fees, and charitable donations, we conduct research on financial products and practices, promote effective state and federal policies, convene a coalition of community investment stakeholders working to improve access to credit, and help people use our work to understand the issues and develop and implement solutions.

## About the Event

The 40<sup>th</sup> Anniversary Research Symposium & Bash theme is “Babies, Boomers & Beyond: Economic Security, Community Prosperity, and Equity Across the Lifespan.” It will bring together community leaders, policymakers, and researchers from Illinois and beyond to discuss how we can achieve a just financial system in which all persons have opportunities across the lifespan to transact business, borrow, save, and build wealth to advance economic security and community prosperity. The event is designed to be a catalyst for discussion and new ideas, as well as action and partnership.

## 8. Audience

Primary:

- Grasstops leaders and staff of colleague organizations (policy, community-based, and direct service)
- Staff at local Illinois and federal legislative and regulatory offices
- Journalists and researchers (local and national, primarily financial services beat)
- Grantmakers (local and national, current and prospective)
- Staff at financial institutions

Secondary:

- Students
- Interested individuals
- Former Woodstock Institute board and staff members

## 9. Scope and Guidelines

The scope of this project is to create engaging video to highlight Woodstock’s 40 years of applied research and impact. Woodstock staff will provide assistance in setting up interviews and institutional knowledge for the story outline, as well as provide archival materials as necessary. A candidate that can handle all production is strongly preferred.

### Discovery:

Confirm audiences, objectives, graphic look and feel, and budgetary constraints, resulting in a creative brief.

### Production:

Based on the approved creative brief and storyline, the selected applicant will be responsible for:

- Developing an outline and storyboard of the video in consultation with Woodstock staff.
- Developing scripts for the video to connect interview segments.

- Conducting six to ten interviews with Woodstock staff, board members, partners, policymakers, and funders, both past and present (most will be within the City of Chicago).
- Filming b-roll and other necessary visuals
- Audio editing and scoring
- Video editing (Woodstock staff expect to see a rough cut and have the opportunity to suggest two rounds of edits before the final cut)

Development guidelines:

- The video should highlight:
  - History of Woodstock's development over the past 40 years
  - Seminal research and reports produced by Woodstock
  - Policy advances and major victories
  - The value of our work to thought leaders and coalition partners
- Incorporate existing Woodstock Institute visual style guide
- Project management—An assigned project manager will be made available to coordinate with Woodstock Institute staff, including a reasonable number of calls and meetings to discuss logistics and ideas for production.
- Once the video has been completed and accepted by Woodstock Institute, the video and all contents become property of Woodstock Institute.

Delivery:

Materials will be delivered directly to Woodstock both electronically and in three DVDs.

## 10. Staff resources

The core team will be driven by:

Project Lead: Responsible for sign-off on key decisions, providing project steering, maintaining relationships with internal and external stakeholders, keeping project on schedule and within budget—Katie Buitrago (Senior Policy and Communications Associate)

Advisory Team: Dory Rand (President) and Dan Fair (Web Communications Associate)

## 11. Qualifications

- Submit three to five examples of materials your firm has produced that best reflect your work and relevancy to this project. Briefly list the role your firm played in each project.
- Describe your experience in producing videos for non-profit projects.
- Provide current reference information for three former or current clients.
- Briefly describe your firm's organizational capacity to produce this video (e.g., staff, equipment, software, physical space, office location, etc.).
- Provide a company profile, length of time in business and core competencies.
- Please discuss any vendor partnerships.
- Please discuss your ability to meet Woodstock's expected timelines for deliverable completion.
- Additional terms and conditions.

## 12. Evaluation Criteria

The following criteria will form the basis upon which Woodstock Institute will evaluate proposals.

An electronic copy of your proposal must be received no later than 5:00pm CT on Friday, March 22. Please send the proposal to Katie Buitrago at [kbuitrago@woodstockinst.org](mailto:kbuitrago@woodstockinst.org). Your proposal must include a cost proposal. All costs associated with the delivery of the project should be presented in a flat rate, fee for service format. Hard copies of the proposal are not required, but if you wish to submit one, please send it to:

Patricia Woods-Hessing  
Woodstock Institute  
29 E. Madison Ave. Suite 1710  
Chicago, IL 60602

If you have further questions during the proposal process, please contact Katie Buitrago at [kbuitrago@woodstockinst.org](mailto:kbuitrago@woodstockinst.org) or 312-368-0310.

Proposals that meet the mandatory requirements will be evaluated with the following criteria:

- Suitability of the proposal—the proposal meets the needs and criteria set forth in the RFP
- Expertise in recommending and communicating appropriate technical and aesthetic solutions as evidenced by the proposal and references
- Aesthetic capabilities—prior work demonstrates artistic and engaging production
- Candidate experience—candidate has successfully completed similar projects and has the qualifications necessary to undertake this project
- Value/pricing structure and price levels—the price is commensurate with the value offered by the proposer
- The candidate has appropriate staff to develop the site in the time frame needed
- Proposal presentation is presented in a clear, logical manner and is well organized