



**Massachusetts Housing Partnership
Request for Proposals
Homeownership Marketing and Advertising Consultant**

I. Background Information

The Massachusetts Housing Partnership (MHP), a statewide public non-profit affordable housing organization that administers the ONE Mortgage Program, seeks the assistance of a marketing and advertising consultant (hereto referred to as “the consultant” to enter a two-year contract with the option of a one-year extension.

The purpose of the contract is to build awareness, inform, and engage low- and moderate-income renter households who may be looking to purchase their first home in Massachusetts. Our primary focus is on households below 100 percent of the area median income (AMI), households of color, and households currently residing in Boston and Massachusetts’ 26 Gateway Cities.

Since 1990, our homeownership programs have assisted over 25,000 low- and moderate-income homebuyers in Massachusetts by providing below market mortgage loans in partnership with private lenders. After 30 years of successful performance, and within a continually evolving housing market and mortgage industry, MHP added programming to better reach underserved households with ONE+Boston (through a partnership with the City of Boston) and MassDREAMS (through a partnership with the state’s Executive Office of Housing and Livable Communities).

Proposals are requested to assist MHP with a messaging and branding strategy combined with the creation and deployment of various marketing and advertising efforts including but not limited to: online display, social media ads, radio, video, and other impactful channels.

More information about MHP and ONE Mortgage can be found at www.mhp.net.

II. Scope of Work

In order to be successful in this role, the consultant’s team will need to be able to develop an understanding of:

- The objectives of MHP’s homeownership team and associated programs/products
- How MHP and its partner lenders provide financing to homebuyers
- How MHP’s homeownership programs/products compare to others and compete in the market

The consultant will be responsible for completing the following deliverables:

- Develop a strategy to reach the intended audience of low- and moderate-income first-time homebuyers, including:
 - Households below 100 percent AMI,
 - Households of color,

- and Households currently residing in one of Massachusetts' 26 Gateway Cities.
- Recommend a mix of advertising and marketing channels, as well as other potential outlets for advertising (e.g. MBTA ads, billboards, etc.),
- Develop racially diverse, culturally sensitive creative assets in English and Spanish, with potential, to expand into Chinese, Portuguese, or other key languages
- Develop assets with attention to accessibility needs,
- Traffic ads to media outlets,
- Work with MHP to identify key performance indicators,
- Track campaign performance,
- Recommend campaign adjustments and optimizations to improve performance ,
- Provide monthly, quantitative and qualitative reports on campaign performance,
- and Provide a final performance report at the end of the engagement period.

III. Timeline

With an intended implementation date of June 1, 2024, the Consultant should please consider the project timeline below:

- March 28, 2024 – Request for Proposals Issued by MHP
- April 12, 2024 – Email MHP with intent to submit a proposal
- April 24, 2024 - Proposals due to MHP
- May 8, 2024 - Firm selection
- May 22, 2024 - Project budget and contract finalized
- June 8, 2024 – Initial phase of new marketing and ad campaign begins

IV. Budget

MHP has a yearly budget of approximately \$100,000.

V. Proposal Submission

The proposal for submission must include the following information:

- Cover letter or executive summary describing proposed methodology and tactics, signed by the individual authorized to negotiate for and contractually bind the agency,
- Project plan, including;
 - i. Key personnel and their roles in providing service,
 - ii. General approach and methodology in providing the services,
 - iii. Details about project scope, timelines, milestones, etc.,
 - iv. Expectations of MHP staff to assist with the process,
- Experience and qualifications of the firm and of key personnel,
- and a Diversity, equity, and inclusion plan.
 - i. Please describe your organization's commitment to the principles of diversity, equity, inclusion
- Three references,
- Recent examples of the type of work requested,
- Pricing (including estimates for personnel time and expense, materials, travel cost and overhead),
- and a Proposed timeline.

VI. Submission Information

- **Registration** - Consultants who intend to submit proposals to MHP should email Nicole Yang, Data and Communications Analyst, at nyang@mhp.net by **April 12, 2024**. Please CC Elliot Schmiedl, Director of Homeownership, at eshmiedl@mhp.net.
- **Proposal Deadline** - All proposals are due no later than **5 p.m. Eastern Time on Wednesday, April 24, 2024** and should be submitted electronically to Nicole Yang, nyang@mhp.net. Please CC Elliot Schmiedl, Director of Homeownership, at eshmiedl@mhp.net.

VII. Process for Selection

Proposals submitted in accordance with this RFP will be evaluated by a selection committee composed of MHP staff. All respondents will be notified of the outcome of the review of their proposal. MHP will give preference to firms that have a minimum of three years market research expertise in working with our target population and/or in the mortgage industry. The quality and specificity of the proposed work plan and quality of references will be strongly considered. MHP may elect to hold interviews with agencies proposing to provide this work; such interviews may be considered as

additional selection criteria. Additionally, proposals will be evaluated pursuant to the following criteria:

- Responsiveness to requirements of RFP
- Understanding of proposed scope of services and approach to addressing MHP's specific needs and objectives
- Technical capabilities and management plan
- Diversity, Equity, and Inclusion plan
- Demonstrated experience and qualifications
- Cost effectiveness

VIII. Right to Reject Proposals

MHP reserves the right to reject any or all proposals if it is in MHP's interest to do so. MHP may consider any proposal not prepared and submitted in accordance with the provisions hereof and may waive any informality or reject any and all bids should MHP deem it to be in their interest. MHP may also reject proposals which in its sole judgment are incomplete.

IX. Additional Provisions

MHP reviews proposals and hires consultants with a lens toward diversity, equity, inclusion and providing equitable access to communities that have been historically underserved on the basis of race, color, ethnicity, gender, national origin, age, religion, sexual orientation, disability, marital or familial status, ancestry, or status as a veteran. Businesses owned and/or primarily operated by individuals who identify as a member of one or more of these communities are strongly encouraged to apply. For any questions about this RFP, please contact Nicole Yang at nyang@mhp.net.

Appendix A

MHP's ONE Mortgage Program terms

Who is eligible for a ONE Mortgage:

- First-time homebuyers buying in the Commonwealth of Massachusetts.
- Low- and moderate- income households with a total household income under 100 percent AMI. See current income limits at www.mhp.net/incomelimits.
- Households with less than \$75,000 in total household assets. This includes checking accounts, savings accounts, stocks, or bonds. This does not include most retirement and college savings accounts.
- Homebuyers with a credit score of at least 640 to buy a single family or condo, and at least 660 to buy a two- or three-family home.
- Homebuyers who plan to live in the property as their primary residence.
- Homebuyers who have taken a first time homebuyer class. See a list of CHAPA-approved classes at www.mhp.net/one-mortgage/homebuyer-resources/find-a-home-buyer-class.

Massachusetts Gateway Cities:

- Attleboro
- Barnstable
- Brockton
- Chelsea
- Chicopee
- Everett
- Fall River
- Fitchburg
- Haverhill
- Holyoke
- Lawrence
- Leominster
- Lowell
- Lynn
- Malden
- Methuen
- New Bedford
- Peabody
- Pittsfield
- Quincy
- Revere
- Salem
- Springfield
- Taunton
- Westfield
- Worcester