

Questions and Answers as of August 27, 2021 to CHFA 238-Request for Proposals (“RFP”) for Creation and Implementation Strategy of a Rebranding Initiative for CHFA:

Question: Please clarify what you are looking for in #5 of the “Minimum Submission Requirements” section – is this referring to examples of work firms have done in the financial and government sectors (from the previous question)? Or is CHFA looking for examples of the firm’s most creative/interesting rebranding work?

Answer: Responders are encouraged to submit examples of relevant artistry from prior projects, but CHFA would welcome examples of creative and interesting rebranding work from other sectors if that artistry might be utilized in the execution of the proposed project.

Question: Which documents (exhibits) have to be notarized and returned along with the RFP response?

Answer: Along with your RFP response, the following must be provide to CHFA: 1) Exhibit A completed, signed, and notarized; 2) Exhibit B OPM Form 1 completed, signed, and notarized; 3) SEEC Form 10 completed on page 3, and signed; and 4) a copy of your insurance certificate in the amounts listed in Exhibit C.

Question: Does the agency/organization submitting a response need to be registered with the Connecticut Department of Administrative Services under contract award number 13PSX0236?

Answer: Firms submitting a proposal do not have to be registered with the Connecticut Department of Administrative Services under 13PSX0236. However, selected firm(s) must be authorized to do business in the State of Connecticut.

Question: How many agencies are you speaking to/under consideration?

Answer: This is the question and answer period, and no firms are under consideration at this time. Responses will not be reviewed or considered until after the submission date/time has expired.

Question: Our firm is currently performing work another housing authority. The work we’re doing for them remains in the confines of that state. Do you consider this to be a conflict?

Answer: It is difficult to determine whether there is a conflict without having more specific details about the engagement.

Question: What would cause the CHFA to select an agency partner that does not have a Connecticut presence? What conditions would an agency outside Connecticut have to meet to be successful in pursuing this engagement with CHFA or is the lack of physical office space in Connecticut disqualifying?

Answer: The evaluation criteria is listed in the RFP. A lack of a physical office space in Connecticut would not disqualify a firm.

Question: Is there a specified budget and timeline for this work? Similar work for a 12-18 month project can typically range between \$450k - \$550k plus costs for actual implementation, which can vary quite a bit depending on the inclusion of website(s) redesign. Is this within an acceptable range for CHFA?

Answer: While CHFA does not have a specific budget amount, \$450,000 is not within the anticipated range. If firms think Website redesign should be part of the project, please feel free to include that in the proposal but please break out the fees.

Question: Is there an openness and/or expectation for renaming?

Answer: Although CHFA does not anticipate renaming the agency, CHFA is open to suggestions.

Question: Can we expect that the articulation of the mission, vision and values are subject to change as a result of this initiative; or are certain elements mandated to remain as is?

Answer: CHFA was created by the Connecticut legislature and its mission is set forth in the statutes and will not change. While it is not anticipated that the articulation of its vision and values will change, CHFA is open to suggestions.

Question: Please describe the governance process CHFA will institute to see this project through? What roles will constitute the core team and how many departments and individuals will need to approve decisions in order to make progress?

Answer: The rebrand initiative will be overseen by a 5-7 person team made up of internal and external stakeholders, led by the Director of Research, Marketing and Outreach (RMO). The team will provide insight and guidance to the selected vendor, but all decisions will be made by the CEO in consultation with and support from the RMO Director.

Question: *Can you please clarify what CHFA is looking for as output from the agency based on the below requirement?*

- *Development of digital (e.g., web-based, social media) and traditional (e.g., television, radio, print) marketing strategies that raise general public awareness of CHFA’s mission and promote CHFA’s programs, products and services to new and existing stakeholders.*

Does this mean CHFA is looking for the selected agency to provide a recommended media plan? Or is this focused on just the agency providing an overall marketing plan strategy? Or is CHFA looking for the agency to develop creative assets for all of the media referenced and if so, please quantify how many assets are needed?

Answer: CHFA expects that respondents will provide an overall marketing strategy designed to roll out the new brand. As part of that rollout strategy, respondents are encouraged, based on prior experience, to include the type and quantity of creative assets they feel would be needed.

Question: *Has CHFA conducted any market research over the last three years that may have bearing on this assignment?*

Answer: In 2020, CHFA extensively surveyed stakeholders and conducted focus groups as part of its current strategic plan. A summary of the strategic plan may be found on CHFA’s website at <https://www.chfa.org/about-us/strategic-planning-/>

Question: *Are there budget parameters that need to be considered for this project—both the initial rebranding work as well as the ongoing implementation of the strategy?*

Answer: CHFA does not have a specific budget range to disclose.

Question: *What is the estimated date/timing for when CHFA would like to be launched and in market?*

Answer: CHFA anticipates the initial rebrand initiative will be completed by end of the second quarter of 2022, with the launch and rollout continuing through the end of 2022.

Question: To most effectively and efficiently reach all of CHFA’s target audiences, can firms partner with another agency with complimentary resources?

Answer: CHFA does not typically permit subcontracting.

Question: Is there a specific reason to do this brand redesign project now?

Answer: CHFA recently completed its three-year strategic plan. As part of the planning process, a common theme from across many stakeholder groups was a lack of awareness or visibility of CHFA and its brand. Based on that feedback, CHFA has established a marketing and outreach department designed to create and elevate CHFA’s brand. The selected vendor will assist in this endeavor.

Question: Are there any “must haves” as part of the brand redesign?

Answer: A brand redesign should include target audience analysis and messaging that speaks to said audiences; strong understanding of customer perceptions of CHFA and its brand; and strategies for consistently developing and delivering branded content across multiple platforms.

Question: Are there current brand identity guidelines that exist?

Answer: The most recent rebrand was completed in 2014. The organization has moved away from most of those brand identity guidelines with the exception of the logo.

Question: Is there any existing data around the types of platforms your current audiences are using?

Answer: According to Google Analytics, the mobile/desktop split is 50/50, with about 2/3 of mobile users accessing CHFA’s website via Apple devices. In terms of social media platforms, Facebook is our highest touchpoint, followed closely by LinkedIn.

Question: What strategies does CHFA currently use to reach non-English speaking audiences? How many languages do you typically target?

Answer: CHFA’s primary non -English-language outreach is targeted towards Spanish speakers. CHFA is currently running a campaign targeted toward Spanish speakers via La Identidad and CTLN. Outreach strategies include creating Spanish-language digital advertising that points toward a Spanish-language webpage (www.chfa.org/mihogar). Later this fall, CHFA will launch a homeowner assistance fund meant to help homeowners who have been adversely impacted by COVID-19 and the resulting economic downturn. As part of this launch, CHFA is developing digital and print materials and messaging for audiences that speak a wide variety of languages.

Question: What are the touchpoints that you consider the most important?

Answer: Historically, CHFA's most successful and important touchpoints have been in-person events to promote its more popular programs and services, specifically its first-time homebuyer programs or its multifamily financing programs. These have ranged from "lunch and learn" style presentations to lenders and realtors, to community-based housing fairs, to larger Q&A sessions in conference halls. The pandemic has forced CHFA to re-evaluate how it engages with stakeholders virtually. Thus far, the focus has been sending people to CHFA's website and social media channels. Going forward, CHFA expects that a rebranding effort may include strategies for creating and strengthening a digital-first presence, supplemented with limited in-person experiences at least for the coming months.

Question: Is there any specific reason for being so quiet on social media?

Answer: Prior to February 2021, CHFA had limited capacity to actively engage on social media. Since the creation of the Research, Marketing and Outreach ("RMO") department in February, CHFA has made a more concerted effort to establish a stronger presence on social media and engage more effectively with followers. RMO continues to experiment with messaging, content type and frequency to optimize outreach and engagement.

Question: Would firms have access to key CHFA employees? Will decision makers be available during the process?

Answer: Yes, firms will have access to key staff and decision-makers as part of the rebrand process.

Question: Has there been any recent research data on awareness and perceptions of CHFA among Connecticut businesses and consumers?

Answer: From time to time, CHFA has conducted an attitudes and awareness survey of its stakeholder groups. The most recent survey was conducted in 2016 and many of the stakeholder groups were involved in the recent strategic planning process completed in 2020. CHFA has not conducted any research of awareness or perceptions of non-stakeholder groups or those who might self-identify as "potential first-time homebuyers."

Question: What is the ad spend that is allocated for the project? Should firms include the ad spend as part of the quote or should firms only quote fees?

Answer: CHFA recognizes that launching its rebranded identity will be a key component of the initiative. CHFA expects to work with the selected vendor to develop these activities and will set

a budget accordingly. Respondents are encouraged to provide an estimate of the ad spend they anticipate might be needed based on prior relevant experience.

Question: Is there an incumbent?

Answer: There is not an incumbent.

Question: Will there be any in-person meetings or could they all be virtual? Are there events/times that an on-site person would be required?

Answer: Due to the pandemic, it is anticipated that everything will be done virtually.
