



West Virginia Housing Development Fund

Request for Proposals

Professional Advertising and Marketing Services

February 2024

General Information

The West Virginia Housing Development Fund (the Fund), a public body corporate and governmental instrumentality of the State of West Virginia, is seeking a qualified firm to perform advertising and marketing services.

The Fund was established by the Legislature in 1968 to increase the supply of and access to safe, affordable housing in West Virginia. The Fund accomplishes this by providing construction and permanent financing to public and private sponsors of affordable multifamily residential rental housing. Additionally, the Fund operates mortgage loan programs designed to help qualified borrowers achieve the dream of homeownership. To learn more about the Fund, please visit www.wvhdf.com.

To advance our mission, the Fund needs to communicate to various stakeholder groups, including the public, staff, potential home buyers, real estate developers, lending institutions, public housing authorities, nonprofit organizations, state and federal elected officials, the media, and more. As such, it is important for the Fund to have a clear, consistent message that targets these audiences using appropriate methods. The Fund is requesting proposals from qualified, West Virginia-based advertising and marketing firms to work collaboratively with Fund staff to provide professional services including advertising, media buying, and graphic design to market and promote the Fund's programs. These promotional efforts may include the creation and placement of traditional and digital advertising, website development and maintenance, assistance in producing a multimedia-based annual report, the creation of program logos, market research, and other efforts as deemed necessary by the Fund.

To be considered, firms must:

- be licensed to do business in West Virginia and properly insured;
- submit a proposal in electronic format that includes all required elements;
- be willing and able to begin work on July 1, 2024; and
- enter into a three-year contract to expire June 30, 2027.

A timeline of the process and proposal requirements can be found on the following pages.

There is no express or implied obligation for the Fund to reimburse firms for any expenses incurred in preparing proposals in response to this request. The Fund may invite select finalists to have key personnel make a presentation and/or discuss the proposal. The Fund will not be responsible for expenses incurred in attending any such interview.

Submission of a proposal indicates acceptance by the firm of the conditions contained in this Request For Proposal (RFP), unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Fund and the firm selected.

Any questions about this RFP must be submitted in writing on or before Friday, March 1, 2024, to Communications Administrator Whitney Humphrey at whumphrey@wvhdf.com in accordance with the instructions set forth in this RFP. ***Contact with other Fund personnel, Audit Committee members or the Board of Directors regarding this RFP may be grounds for elimination from the selection process.***

Nature of Services Requested

The selected firm will provide professional advertising services for development and implementation of the Fund's advertising plan. The scope of services is expected to include, but is not limited to:

- (1) graphic design and advertising related services for various print material, including brochures, pamphlets, booklets, and digital communications used to promote and describe Fund programs;
- (2) the development of a web-based annual report, using animation, charts, graphics, and video to tell the Fund's story;
- (3) assistance with developing the Fund's overall marketing strategy and approach to best reach our various audiences;
- (4) the ability to develop television, radio, and digital advertising, from concept to production;
- (5) the ability to procure all advertising placements;
- (6) the development of analytic reports to measure campaign effectiveness and performance;
- (7) develop and assist with maintaining the Fund's website, including microsites;
- (8) assist communications staff with public relations, media relations, social media, email campaigns, and other aspects of the Fund's overall communications strategy as needed;
- (9) additional services may be requested on an as-needed basis, including market research and production or design services for special projects.

Vendors must affirm that they can meet these criteria.

Terms and Conditions

See Attachment A for General Terms and Conditions.

The vendor must perform to the Fund's satisfaction should the Vendor be selected to sign a contract. The Fund intends to contract for the described services for a three-year period beginning on July 1, 2024.

The Fund reserves the right to the following:

- Amend, modify or withdraw this RFP;
- Require supplemental statements or information from any responding party;

- Accept or reject any or all proposals hereto;
- Extend the deadline for submission of proposals hereto;
- Negotiate or hold discussions with any vendor and to correct deficient proposals which do not completely conform to the instructions contained herein;
- Cancel or reissue this RFP, in whole or in part, if the Fund deems it is in its best interest to do so;
- Interview proposers prior to selection; and
- Enter into an agreement or engage with one or more firms.

The Fund may exercise the forgoing rights at any time without notice and without liability to any respondent or any other party for its expenses incurred in the preparation of responses hereto or otherwise. Proposals in response to this RFP will be prepared at the sole cost and expense of the responding party.

By signing and submitting a proposal, the successful vendor agrees to be bound by all the terms and conditions set forth in this section of the RFP.

Content of Proposals

All proposals must include:

- An executive summary describing your firm, including:
 - a general history
 - areas of expertise
 - a description of the technical, graphic design, and administrative services you provide, as well as production capabilities and facilities
 - office location
 - contact information, including website and social media handles
- The names, resumes, and contact information of each of your staff members and subcontractors who would work on the Fund's account, including each individual's educational background, technical experience, and work experience
- A list of three client references for whom your firm has provided similar services. Please include the name of the organization as well as the contact person's name, title, address, telephone number, and email address for each reference
- A minimum of two samples of actual advertising campaigns produced for other clients and the estimated cost of the campaigns. Samples should include, at minimum:
 - an example of one digital ad and results
 - an example of one tv ad and results
 - graphic design examples such as a logo, print ad, or flyer
 - an example of one website developed by your agency
- A fee and billing structure and explanation of service charges, fees for media buys, and all other anticipated fees and expenses. Proposed prices must be effective for a period

of 60 days after the RFP submission and if your firm is selected, must remain in effect through the term of the executed contract.

- A conflicts of interest disclosure if you are aware of any possible conflicts of interest between your firm and any West Virginia Housing Development Fund personnel. If so, describe in detail the nature of the conflict.
- All proposals must include an executed copy of the Proposers Guarantees and Warranties (Attachment B)

Instructions for Submitting & Timeline

Proposal Deadline: 4:30 p.m. Friday, March 8, 2024

Interviews: Wednesday, March 20, 2024- Thursday, March 21, 2024

Evaluation Period: March 22-April 4, 2024

Award Announced: Friday, April 5, 2024

Contract Begins: Monday, July 1, 2024

All proposals should be submitted in PDF format (videos may be attached in the appropriate format) via email to Communications Administrator Whitney Humphrey at whumphrey@wvhdf.com no later than 4:30 p.m. Friday, March 8, 2024, with the subject line "WVHDF Marketing RFP." It is the responsibility of the marketing firm to ensure the submission has been received and files can be opened. The Fund bears no responsibility for emails that are undeliverable or delayed.

Questions about this RFP may be directed to Whitney Humphrey via email by 4:30 p.m. Friday, March 1, 2024. **No phone calls, please.** Responses to these questions will be provided within 2-3 business days and added as addenda to the RFP and distributed to all responding marketing agencies. Submissions cannot be withdrawn or edited once received. No hard copy submissions will be accepted.

Evaluation Process

A. Staff Review & Committee Approval:

A committee comprised of Housing Development Fund staff will review RFP proposals and interview responses and present recommendations to the Executive Director. The committee will recommend the proposal that best meets the requirements of the RFP and satisfies the Fund's marketing needs. Cost will be considered but will not be the deciding factor. The Fund seeks to contract with the most qualified bidder within budget constraints. The Housing Development Fund is not a spending unit of the State of West Virginia; therefore, is not subject to procurement procedures.

B. Final Selection:

The Fund will select a firm based upon the final recommendation of the search committee.

C. Right to Reject Proposals:

Submission of a proposal indicates acceptance by the firm of the terms and conditions in this RFP, unless clearly noted in the proposal and confirmed in the contract between the Fund and the firm selected. The Fund reserves the right without prejudice to reject any or all proposals.

ATTACHMENT A

GENERAL TERMS AND CONDITIONS

- 1. ACCEPTANCE:** Vendor's signature on its proposal (bid), or on the certification and signature page, constitutes an offer to the Fund that cannot be unilaterally withdrawn, signifies that the service proposed by the Vendor meets the mandatory requirements contained in the RFP for that service, unless otherwise indicated, and signifies acceptance of the terms and conditions contained in the RFP unless otherwise indicated.
- 2. ADDITIONAL FEES:** The Vendor is not permitted to charge additional fees or assess additional charges that were not either expressly provided for in the RFP published by the Fund or included in the Fee Proposal that the Vendor is required by the RFP to provide. Including such fees or charges as notes to the RFP may result in rejection of Vendor's bid. Requesting such fees or charges be paid after the Contract has been awarded may result in cancellation of the Contract.
- 3. CONTRACT TERM:** The period during which the Vendor will provide services, unless otherwise terminated in accordance with the contract, will be for a three-year period beginning July 1, 2024. At the end of the contract's term the Fund will have the option, in its sole discretion, to renew the contract on the same terms and conditions. The Fund will give the Vendor written notice of its intent to exercise the option no later than 30 days before the end of the contract's then current term.
- 4. PRICING:** Proposal prices shall constitute the total cost to the Fund for complete performance in accordance with the requirements and specifications herein. Vendor shall not invoice for any amounts not specifically allowed for in this RFP.
- 5. INVOICING:** Invoices will be billed as charges are incurred and are payable within 30 days of the date of the invoice. WVHDF may, upon notice to the Vendor, withhold payment for work not performed in compliance with the contract and/or reasonably question any item reflected on the Vendor's invoices. Pending the settlement or resolution of the issue(s), the non-payment shall not constitute a default of the contract. The Fund shall pay all amounts due that are not in dispute.
- 6. ADDITIONAL PROFESSIONAL SERVICES:** If it should become necessary for the Fund to request the Vendor to render any additional services to either supplement the services requested in this RFP or to perform additional work as a result of the specific recommendations included in any report issued on this engagement, then such additional work shall be performed only if set forth in an addendum to the Contract between the Fund and the Vendor.

- 7. CANCELLATION:** The Fund reserves the right to cancel the Contract immediately upon written notice to the Vendor if the services supplied do not conform to the specifications contained in the Contract. The Fund may also cancel the Contract for any reason upon 30 days written notice to the Vendor. The Fund shall be obligated only for services rendered and accepted prior to the date of the notice of termination.
- 8. TIME:** Time is of the essence with regard to all matters of time and performance in the Contract.
- 9. COMPLIANCE WITH LAWS:** The Vendor shall comply with all applicable federal, state, and local laws, regulations, and ordinances. By submitting a bid, Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances. Vendor shall notify all subcontractors to provide commodities or services related to the Contract that as subcontractors, they too are required to comply with all applicable laws, regulations, and ordinances.
- 10. STATE PROCUREMENT:** The Fund is a fully self-supporting public body corporate and governmental instrumentality of the State of West Virginia and as such, receives no appropriations from the State of West Virginia, is not a State spending unit, nor is it required to purchase through the State purchasing office or follow State of West Virginia procurement procedures. The Fund's procurement policies can be found at <https://www.wvhdf.com/about-wvhdf/wvhdf-act-and-by-laws> .
- 11. ASSIGNMENT:** Neither the Contract nor any monies due, or to become due hereunder, may be assigned by the Vendor without the express written consent of the Fund.
- 12. FUND EMPLOYEES:** Fund employees are not permitted to utilize the Contract for personal use and the Vendor is prohibited from permitting or facilitating the same.
- 13. PRIVACY, SECURITY, AND CONFIDENTIALITY:** The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the Fund unless required to do so by law, and Vendor agrees to give the Fund immediate notice of any such request.
- 14. YOUR SUBMISSION IS A PUBLIC DOCUMENT:** Proposal submissions and other documents become public records once submitted to the Fund and are subject to disclosure under the Freedom of Information Act unless an exemption applies.

IF YOU SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE, NOTE AS SUCH.

15. LICENSING: Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Upon request, the Vendor must provide all necessary releases to obtain information to enable the Fund to verify that the Vendor is licensed and in good standing with the above entities. The Vendor shall notify all subcontractors providing commodities or services related to the Contract that as subcontractors, they too are required to be licensed, in good standing, and up-to-date on all state and local obligations as described in this section.

The Vendor certifies by submission of a bid that it is not a debarred, suspended, or ineligible contractor by any Agency of federal or State government. (No proposal received from a debarred, suspended, or ineligible contractor will qualify for award).

16. VENDOR CERTIFICATIONS: By signing its bid or entering into the Contract, Vendor certifies (1) that its bid was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid or offer for the same material, supplies, equipment or services; (2) that its bid is in all respects fair and without collusion or fraud; (3) that the Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; and (4) that it has reviewed this RFP in its entirety; understands the requirements, terms and conditions, and other information contained herein. The Vendor's signature on its bid, offer or proposal also affirms that neither it nor its representatives have any interest, nor shall acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the Fund. The individual signing this bid on behalf of the Vendor certifies that he or she is authorized by the Vendor to execute this bid, or any documents related thereto on the Vendor's behalf; that he or she is authorized to bind the Vendor in a contractual relationship; and that, to the best of his or her knowledge, the Vendor has properly registered with any State agency that may require registration.

17. VENDOR RELATIONSHIP: The relationship of the Vendor to the Fund shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by the Contract. The Vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this RFP and resulting contract. Neither the Vendor, nor any employees or subcontractors of the Vendor, shall be deemed to be employees of the Fund for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments,

penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing. Vendor shall hold harmless the Fund and shall provide the Fund with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

Vendor shall not assign, convey, transfer, or delegate any of its responsibilities and obligations under this contract to any person, corporation, partnership, association, or entity without express written consent of the West Virginia Housing Development Fund.

All layouts, sketches, artwork, and copy, including but not limited to advertising copy, film, typesetting, photocopies, story boards, and computer data storage used in advertisements or other materials developed or placed by or for the Housing Development Fund shall become exclusive property of the West Virginia Housing Development Fund.

18. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the Fund, its officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.

19. CONFLICT OF INTEREST: The Vendor, its officers, members, or employees, shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. The Vendor shall periodically inquire of its officers, members, and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the Fund.

20. SPECIAL TERMS AND CONDITIONS: The Fund shall receive the benefit of all media cash discounts, rebates, frequency discounts, or special adjustments allowed to the agent for media placed for and on behalf of the Fund. The vendor shall make available to the Fund copies of all invoices, including broadcast affidavits, and proof of payment of all invoices, including any third party that was used to provide production services or materials for the Fund account. Such proof shall be made available to the Fund quarterly.

Should the Fund wish to use any forms of advertising, materials, or services not herein provided for, the vendor will, at the Fund's request, assist in their consideration and preparation. The costs for such assistance shall be in accordance with the costs stipulated in the financial section of the vendor's contract.

The Fund shall determine the proper time schedule in which advertising and promotions are to take place. The Fund must approve all work to be written, developed, or otherwise performed by the vendor before any costs are incurred by the vendor.

Total expenditures for the Fund advertising and promotions program shall not exceed the amount set by the Fund, unless such change is requested and by mutual consent is agreed to.

The successful vendor must have the ability to accept data electronically.

All layouts, sketches, artwork, and copy including but not limited to advertising copy, film, typesetting, photocopies, story boards, and computer data storage disks used in advertisements or other materials developed or placed by the vendor for the Fund shall become the exclusive property of the Fund. The Fund shall have the full and free right to possess and use any and all said property in any way deemed it necessary or advisable, either directly or through the vendor, or otherwise and without payment to the vendor for same.

ATTACHMENT B

VENDOR GUARANTEES AND WARRANTIES

- A. Vendor certifies it can and will provide and make available, as a minimum, all services set forth in the RFP, unless otherwise stated in its proposal (bid).
- B. Vendor warrants that it is willing and able to comply with all applicable federal, state, and local laws, regulations, and ordinances.
- C. Vendor warrants that all information provided with its bid in response to the RFP is true and accurate.
- D. Vendor warrants that it agrees to furnish all equipment, tools, and fully trained personnel necessary to properly perform the services set forth in the RFP and agrees to perform all said services in a timely, professional, and competent manner, unless otherwise stated in its proposal.
- E. Vendor warrants that it shall have in effect upon the contract award and maintain throughout the life of the contract and shall furnish proof of such upon request:
 - 1. Errors and omissions insurance coverage providing a prudent amount of coverage for the willful or negligent acts, or omissions of any officers, employees, or agents thereof;
 - 2. Workers' Compensation insurance as required by West Virginia state law; and
 - 3. Commercial General Liability Insurance coverage with not less than \$500,000 per incident to cover losses resulting from, or arising out of, Vendor action or inaction in the performance of the Contract by the Vendor, its agents, servants, employees, or subcontractors.
- F. Vendor warrants that it shall require that any subcontractors providing primary services (as opposed to non-critical ancillary services) under this Contract obtain and maintain the same levels of insurance as is required of the Vendor.
- G. Vendor warrants that the person signing its bid and the certification and signature page of the RFP is entitled to represent the Vendor, empowered to submit the bid, and authorized to sign a contract with the Fund.

CERTIFICATION AND SIGNATURE: By signing below, I certify that I have reviewed this RFP in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the Fund that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the RFP for that product or service, unless otherwise clearly stated herein; that the Vendor accepts the terms and conditions contained in the RFP, unless otherwise stated herein; that the Vendor certifies/warrants the conditions in Attachment A - General Terms and Conditions and Attachment B - Vendor Guarantees and Warranties; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on the Vendor's behalf; that I am authorized to bind the Vendor in a contractual relationship; and that to the best of my knowledge, the Vendor has properly registered with any State agency that may require registration.

(Vendor / Firm) _____

(Signature of Authorized Representative)

(Printed Name and Title of Authorized Representative)

(Date)

(Phone Number) (Fax Number)

(Email Address)

ATTACHMENT C

ADDENDUM ACKNOWLEDGEMENT FORM

Instructions: Please acknowledge receipt of all addenda issued with this RFP by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specifications, etc.

Addenda Received:

(Check the box next to each addendum received)

- ☐ Addendum A
- ☐ Addendum B
- ☐ Addendum C
- ☐ Addendum D
- ☐ Addendum E
- ☐ Addendum F

I understand that failure to confirm the receipt of addenda may be cause for rejection of this proposal. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any Fund personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

(Vendor / Firm)

(Signature of Authorized Representative)

(Printed Name and Title of Authorized Representative)

(Date)

NOTE: Vendor must submit this addendum acknowledgement with its proposal.

Revised Addendum A

Question: The Content of Proposals section of the Fund's Request for Proposals for Professional Advertising and Marketing Services, page four, bullet point four requests that the responder submit: A minimum of two samples of actual advertising campaigns produced for other clients and the estimated cost of the campaigns. Does the language "produced for other clients" prevent the incumbent agency from submitting work done for the Fund as sample work?

Original Answer: Yes. The Fund would prefer to see all responding vendors submit examples of advertising campaigns created for clients that do not include the West Virginia Housing Development Fund.

Clarification: While the Fund would prefer to see examples of advertising campaigns created for other clients, we will allow the incumbent agency to submit up to one sample advertising campaign created for the West Virginia Housing Development Fund.

Question: Do you have a budget in mind?

Original Answer: Because this is a three-year contract that encompasses traditional and digital advertising placements, website development, and the potential for other large-scale projects, we would prefer not to discuss budget at this time. Once a vendor is selected, the two parties will negotiate a budget for each fiscal year based on the Fund's projected needs, to include media placements, website hosting, video production costs, graphic design, and other expenses as necessary and approved by the Fund.

Clarification: The Fund's average annual marketing budget over the last three years was \$513,520.00. We do not expect the budget for next fiscal year to exceed this amount. However, the Fund is looking for a marketing plan that best meets its needs. Cost will be considered but will not be the deciding factor.

Addendum B

Question: The "Content of Proposals" section of the RFP page 4 final bullet point reads in part: "A fee and billing structure and explanation of service charges, fees for media buys, and all other anticipated fees and expenses." Is the Fund seeking a dollar value as part of the bidder's response for "service charges, fees for media buys and all other anticipated fees and expenses", or simply a description of how those items would apply and be assessed?

Answer: To the extent possible, the Fund would like to see from each bidder the dollar value for service charges, fees, and other anticipated expenses, as well as a description of how these fees are assessed and applied and the vendor's fee schedule.

Addendum C

Question: Is there an existing web-based annual report we could view to understand the scope of the project?

Answer: Traditionally, our annual report has been published as a PDF. For FY2023, we moved to a web-based report, which you can view [here](#). While we're pleased with the presentation, we would like our FY24 report to expand on this and possibly include video, animation, and other elements.

Question: What are any microsite URLs?

Answer: www.wvhomerescue.com houses all information on our WV Homeowners Rescue Program. Applicants apply through an online portal at <https://help.wvhaf.com>, which they can access either directly or by going through the WVHR website.

Question: What is the annual budget for the requested services?

Answer: For the past three years, our average annual advertising budget has been \$513,520. We don't expect the budget for the next fiscal year to exceed this amount, but we are looking for a marketing plan that best fits the Fund's needs. Cost will be considered but will not be a deciding factor.

Question: What is the annual media budget?

Answer: Our average annual media budget for the past three fiscal years is \$344,666 and includes TV air time in alternating weeks throughout the year as well as digital, OTT, Google search, and targeted video advertising.

Question: Does WVHDF prefer to engage with a monthly retainer, hourly pricing, or fixed project pricing?

Answer: WVHDF prefers a monthly retainer but is open to considering fixed project pricing if it is mutually beneficial.

Question: How does WVHDF currently measure success with its website?

Answer: Our website is largely an information depository established for very niche audiences, but we do have several pages promoting our Single-Family mortgage programs and information for lenders and real estate partners where we would like to better track clicks and conversion rates. We do have an

online mortgage inquiry form available on two of our webpages, and our Single Family department can track how many completed forms we receive.

Question: Are there any third-party website integrations we should be aware of (databases, embeds, CRM platform, forms?)

Answer: Current web integrations include our online payment system hosted by FICS and Homeowners Rescue program application, which is hosted by Blue Vector. Our website is currently designed using WordPress and domains are through Network Solutions.

Question: You asked that bidders provide *'The names, resumes, and contact information of each of your staff members and subcontractors who would work on the Fund's account, including each individual's educational background, technical experience, and work experience'*. Are you looking for a traditional full-page resume for each staff member in the agency? Can you specify what contact information you are looking for for each staff member beyond their role and responsibilities at the agency?

Answer: The Fund wants to ensure that everyone working on our account has the appropriate education and/or experience. While a traditional one-page resume would be appreciated, a bullet point list detailing the technical experience and education of each staff member working on our account would suffice. As far as contact information, a phone number and email address will do.

Question: Under *'Nature of Services Requested'* is *'- the ability to develop television, radio, and digital advertising, from concept to production;'*. Does this request require in-house video and audio production capabilities?

Answer: Not necessarily, but we would request additional information on any subcontractors a vendor may use to produce such advertising.

Question: Under *'Nature of Services Requested'* is *'develop and assist with maintaining the Fund's website, including microsites;'*. Does this request require in-house development and maintenance capabilities?

Answer: Because our website is large and houses a lot of information required by federal regulations, we would prefer to work with an in-house web developer whenever possible. Our Communications Administrator and Information Services department are capable of routine maintenance but do sometimes require assistance. Because of the nature of our activities, time is of the essence when it comes to updating the website.

Question: Under *'Content of Proposals'* is *'a description of the technical, graphic design, and administrative services you provide, as well as production capabilities and facilities.'* What type of production facilities are required?

Answer: We don't have any strict requirements as far as production facilities, but we would like to know what facilities vendors have available to them or have used in the past to produce advertising.

Addendum C—Points of Clarification

We received some questions seeking further clarification on Addendum C. Please see below for more detail.

Question: What is your current fee structure (not rates)?

Answer: We pay our current vendor a monthly retainer that is a percentage of the overall marketing and communications budget to cover miscellaneous expenses and for their services. Larger projects such as video or ad production, media buys, and special projects are billed separately. We generally meet with our current vendor every spring to outline projects and set the budget for each project and estimate the total budget for the following fiscal year.

Question: What percentage markup are you currently paying on media purchases?

Answer: 0. The contract and language of this RFP prohibit our current vendor and the awardee of this contract from charging markups on services, including media purchases. The Fund expects to receive the benefit of any and all discounts, rebates, or adjustments allowed to the ad agency for work done on behalf of WVHDF, including media placements.

Question: Is the \$513,520 marketing budget inclusive of agency fees?

Answer: Yes, this is the average yearly budget including a monthly retainer paid to the agency that is a set percentage of the total marketing budget. This retainer includes any and all fees for services.

Addendum D

Question: In reference to Agency Experience, the RFP requests resumes and contact info for all staff members and subcontractors. A full-service advertising firm uses a variety of subcontractors to provide the services included in this RFP. For instance, an agency may pay a video production team for the filming of a television ad, and then pay 25 different television stations and cable systems to air said advertisement. Does WVHDF require the responding agency to provide resumes for all subcontractors, or is providing resumes for all agency staff, and a list and contact information for a sampling of potential subcontractors sufficient?

Answer: To the extent possible, the Fund would like to see a list of subcontractors, including their contact information and a brief description of their education and technical experience, who would exercise creative control over content produced for the Fund. For the purposes of this RFP, the Fund does not consider television stations and cable systems to be subcontractors.

Question: In reference to media buying: Does the WVHDF require the responding advertising firm to subscribe to and show proof of subscription in the RFP that they have Media Buying Software Program for media planning, placement, and tracking? A sample program would be Strata/Freewheel.

Answer: No, the Fund does not require the responding advertising firms to show proof of such subscriptions, but including this can help us better understand the responding firms' abilities to plan, place, and track media on the Fund's behalf.

Question: In reference to media buying: Does the WVHDF require the responding advertising firm to subscribe to and show proof of subscription in the RFP that they have access to third-party, audited data for media? An example of a data provider for WV media markets is Nielsen Media Research.

Answer: No the Fund does not require the responding firms to subscribe to or show proof of subscription to such a service, but including this can help the Fund better understand how the responding firms use data in their media planning activities.

Question: In reference to media buying: Does the WVHDF require the responding advertising firm to be able to run analytical reports on media spend?

Answer: Yes. The Fund is very cognizant of how money is spent and would like to see periodic analytical reports to determine if media spend is meeting projected goals and providing a solid return on investment.

Question: In reference to media buying: Does the WVHDF place traditional media (TV, radio, billboards) internally, then require the responding advertising firm to pay for the media placed?

Answer: No. The Fund does not place media and expects the selected Vendor to have the ability to plan and place all paid media on behalf of the Fund. Generally, the Fund approves the ad placement and is then invoiced by the advertising firm for the cost.

Question: In reference to media buying: Does the WVHDF place social media advertisements internally, then require the responding advertising firm to pay for the media placed? Typically, the payment is required by credit card and is charged at the time of service.

Answer: No. The Fund does not place social media advertisements and expects the selected Vendor to have the ability to place social media and digital advertisements in compliance with the Fund's policy and applicable laws and regulations.

Question: In reference to the Fee and Billing Structure: Should the responding advertising firm submit an hourly cost on the following labor services:

- Contract administration
- Account service
- Design and layout
- Media buying
- PR service
- Website back-end level 1
- Website back-end level 2
- Website security updates
- Website security elevated

Answer: The Fund prefers to pay for these services on a monthly retainer basis. Respondents may provide an estimated total for these services for the purposes of this RFP. If the selected Vendor prefers an hourly rate, the Fund may agree to such payment if it is mutually beneficial.

Question: Should the responding advertising firm bid a media mark-up rate as a percentage? For example, if an advertising firm places a \$1,000.00 ad with a TV station, the advertising firm receives a \$150.00 or 15% discount. Would the advertising firm then bill WVHDF the net cost plus a mark-up? In this example, if a respondent bid a mark-up of 5%, the calculation would be (Net + Mark-Up = \$850 * 1.05 = \$892.50).

Answer: It is expected that the WVHDF receive the benefit of all discounts, rebates, frequency discounts, or adjustments allowed for media placement made on behalf of the Fund. We also

expect to see invoices and proof of payments, including those made to third parties for production services or materials for the WVHDF account.

Question: Per Addendum B, in order to provide a dollar amount value for media placed, is there a media budget this figure should be based upon?

Answer: See Addendum C. The average media budget for the past three fiscal years is \$344,666, which includes television and digital advertising. We do not expect the annual media budget to increase but are looking for a media plan that best fits the Fund's needs. Cost will be considered but will not be a deciding factor.

Question: Can the responding advertising firm charge a mark-up rate on non-media outside expenses? This may include printing, space rentals, website hosting. Is there a limit on the mark-up on outside costs that can be charged?

Answer: The Fund expects to be invoiced for non-media expenses at the vendor's cost. We would like each responding firm to supply a fee and billing structure for our review, and we can discuss in more detail with each firm at the interview stage.

Question: In reference to your website, who is currently your back-end website provider?

Answer: Our current agency provides both front- and back-end web support.

Question: In reference to your website, does eStatus Connect require a specific level of security for the design and updating of your web content?

Answer: FICS handles all maintenance and updating of eStatus Connect. This is not something the selected Vendor will be responsible for.

Question: In reference to your website, what security protocols are currently in place? Is there a plan in place for responding to a widespread data breach?

Answer: The Fund has policies in place for responding to a data breach, and we do have web security protocols in place. This is something we can discuss more in-depth with the selected Vendor after the contract has been awarded.

Question: In reference to video production, does the WVHDF have a standard of quality that must be met by in-house or subcontracted produced video? Lowest bid does not necessarily mean highest quality. How does WVHDF determine what quality they are looking for at different price points?

Answer: The Fund expects high-quality, professionally produced content at all price points. We are looking for content that correctly and succinctly explains our programs and value proposition to target audiences in an effective and appropriate manner. Cost will be a consideration but not the deciding factor. We will select the Vendor whose proposal best fits the Fund's marketing and advertising needs.

Question: In reference to the Annual Report, what is your target publish date for the FY24 Annual Report? In addition to the digital version of the Annual Report, is there a need for a printed version?

Question: Generally, the target publish date for our annual report is September 30. There is no need for a printed version.