



IOWA FINANCE AUTHORITY

Homeownership Marketing

Request for Information RFI-MC-2023

Iowa Finance Authority (IFA)

Information must be received no later than:

March 27, 2023

4:30 p.m. Central Time

For information about this notice, interested persons shall contact only:

Ashley Jared, Communications Director

Iowa Finance Authority

1963 Bell Ave., Suite 200

Des Moines, IA 50315

Phone: 515.452.0474

E-mail: ashley.jared@iowafinance.com

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Background and Objectives

1.1 Purpose

The objective of this Request for Information (RFI) is to solicit responses from qualified vendors for creative and media services to market the Iowa Finance Authority's (IFA) homeownership programs.

1.2 Background Information

The Iowa Finance Authority (IFA) offers mortgage and down payment assistance programs for Iowa homebuyers. IFA seeks to execute highly targeted homeownership marketing initiatives to raise awareness and educate Iowans about the programs available to them. The goal of the campaign is to support an increase in single-family loan production.

The audience for the campaign is Iowa households with a total income of no more than \$152,600, who are looking to purchase their first home, or their next home (repeat buyers are also eligible). The home purchase price can be no more than \$427,000, although a typical purchase price through our programs is approximately \$150,000. The average age of home buyers that use our programs is 33, with 54% of them being male and 42% female, 76% of homebuyers who use IFA's programs are single and 23.5% are married.

IFA seeks to largely use existing creative collateral and is seeking the services of a vendor to plan and execute a paid digital campaign that targets potential homebuyers within our demographic. The selected vendor will also be required to use third-party data of potential Iowa homebuyers in their digital targeting efforts.

1.3 Information Sought

IFA is seeking information from vendors who are interested in assisting in a digital homeownership marketing campaign.

Vendors are asked to submit a recommendation that will provide IFA with a cost-effective and results-oriented approach that will best allow us to meet our goal of increasing the number of homebuyers using our programs. Responses should not exceed ten (10) pages.

Information proposals should specifically include firm capabilities, implementation strategies and associated costs, not to exceed a total of \$180,000.

This RFI will provide background information for vendor selection. The intended purpose of this RFI is to allow all interested vendors to present proposed strategies.

1.4 Request for Information and Procedure

This request requires any vendor wishing to submit information to respond to this Request for Information (RFI) by 4:30 p.m. CST on March 27, 2023.

1.5 Timeline

- Issue RFI: March 6, 2023
- Questions Due: March 13, 2023 at 4:30 p.m. CST
- Responses to questions posted: March 17, 2023
- RFI Due: March 27, 2023, 4:30 p.m. CST

- In-person meetings, at the discretion of the Iowa Finance Authority: Week of March 27, 2023
- Announcement of successful Vendor: On or about April 3, 2023

1.6 Submission of Response

Vendors may email written responses to ashley.jared@iowafinance.com by 4:30 p.m. on March 27, 2023.

1.7 Presentations

IFA will hold in-person meetings the week of March 27, 2023, as deemed necessary.

1.8 Questions and Requests for Clarification

Vendors interested in responding to this RFI may submit questions or requests for clarification. All questions or requests must be submitted by email to: Ashley.jared@iowafinance.com and be received no later than 4:30 p.m. CST on March 13, 2023.

Firms may contact only the Ashley Jared with questions related to the interpretation of RFI and the procurement process. If a firm or someone acting on a firm's behalf attempts to discuss this RFI with any IFA employee, other than Ashley Jared, the firm may be disqualified.

IFA may contact vendors for clarification of RFI content as needed throughout the RFI process.

For information about this notice, interested persons shall contact:

Ashley Jared
Iowa Finance Authority
1963 Bell Ave., Suite 200
Des Moines, IA 50315
Telephone: 515.452.0474
ashley.jared@iowafinance.com

1.9 Review of RFI Responses

1.9.1 IFA reserves the right to reject any and all responses, in whole and in part, received in response to this RFI at any time. Issuance of the RFI in no way constitutes a commitment to award any contract. This RFI is designed to provide vendors with the information necessary for the preparation of informative responses and possible presentations of recommended marketing concepts and plans.

This RFI process is for IFA's benefit and is intended to provide information to assist in the development of future requests for goods and services. The RFI is not intended to be comprehensive and each vendor is responsible for determining all factors necessary for submission of a comprehensive response and a complete capability presentation. The RFI response and demonstration will be a review of a suggested concept, strategies and estimated costs.

1.9.2 An RFI response may be rejected outright and not reviewed for any one (1) of the following reasons, therefore vendors are asked to make every effort to meet the RFI timelines and to include the requested information:

- Failure of Vendor to deliver the response by the due date and time.
- Failure to include information requested in the RFI.

1.10 Evaluation of RFI

In evaluating the responses, IFA must be able to identify:

- Proposed strategies and timeline.
- Anticipated total cost and suggested cost allocation for each proposed tactic.
- Overview of firm capabilities and assigned team members' experience, including case studies for comparable projects.

1.11 Public Records and Requests for Confidentiality

1.11.1 The release of information by IFA to the public is subject to Iowa Code Chapter 22 and other applicable provisions of law relating to the release of records in the possession of a State agency. Vendors are encouraged to familiarize themselves with these provisions prior to submitting a response. All information submitted by a vendor will be treated as public information by the Iowa Finance Authority unless the vendor properly requests that specific information be treated as confidential at the time of submitting the response AND the information is confidential under Iowa or other applicable law. IFA will copy and produce public records as required to comply with Chapter 22 or other applicable law.

1.11.2 Any requests for confidential treatment of information must be included in a cover letter with the Vendor's response. For **each** confidentiality request, the Vendor must (1) enumerate the specific grounds in Iowa Code Chapter 22 or applicable law that supports treatment of the material as confidential, (2) provide adequate justification as to why the material should be maintained in confidence, (3) explain why disclosure of the material would not be in the best interest of the public, and (4) set forth the name, address, telephone, and e-mail for the person authorized by applicant to respond to inquiries by the Authority concerning the confidential status of such material. An applicant's request for confidentiality that does not comply with this section or an applicant's request for confidentiality on information or material that cannot be held in confidence as set forth herein are grounds for rejecting a Response as non-responsive.

1.11.3 Any documents submitted which contain confidential information must be conspicuously marked by the Vendor as containing confidential information, and each page upon which confidential information appears must be marked as containing confidential information. Failure to properly identify specific information as confidential shall relieve IFA or State personnel from any responsibility if confidential information is viewed by the public or a competitor, or is in any way released. If the Vendor identifies its entire Response as confidential, IFA will reject the Response as non-responsive.

1.11.4 In addition to marking the material as confidential material where it appears, the Vendor must submit one copy of the response from which the confidential information has been excised. The confidential material must be excised in such a way as to allow the public to determine the general nature of the material removed and to retain as much of the document as possible. These pages must be submitted with the cover letter and will be made available for public inspection.

If IFA receives a request for information that includes information Vendor has marked as confidential and IFA intends to release such information, IFA will give written notice to the Vendor at least seven calendar days prior to the release of the information to allow the Vendor to seek injunctive relief pursuant to Iowa Code Section 22.8. After seven calendar days, the IFA will release the information marked confidential unless a court of competent jurisdiction determines the information is confidential under Iowa Code Chapter 22 or other applicable law.

If Vendor fails to comply with the request process set forth herein, if Vendor's request for confidentiality is unreasonable, or if Vendor rescinds its request for confidential treatment, IFA may release such information or material with or without providing advance notice to Vendor and with or

without affording Vendor the opportunity to obtain an order restraining its release from a court possessing competent jurisdiction.

1.11.5 Vendor's failure to request confidential treatment of material pursuant to this Section and the relevant laws and administrative rules will be deemed by the Iowa Finance Authority as a waiver of any right to confidentiality which the vendor may have had.

1.12 Copyrights

By submitting a response, the vendor agrees that IFA may copy the response for purposes of facilitating the evaluation or to respond to requests for public records. The Vendor represents that such copying will not violate any copyrights in the materials submitted.

1.13 Restrictions on Gifts and Activities

Iowa Code chapter 68B contains laws which restrict gifts which may be given or received by state employees and requires certain individuals to disclose information concerning their activities with state government. Vendors are responsible for determining the applicability of this chapter to their activities and for complying with these requirements. In addition, Iowa Code section 722.1 provides that it is a felony offense to bribe a public official.

1.14 Content of the Request for Information (RFI)

This RFI is designed to provide vendors with the information necessary for the preparation of an appropriate response. It is not intended to be comprehensive, and each vendor is responsible for determining all factors necessary for submission of a comprehensive response.

- IFA reserves the right to modify this RFI at any time.
- Responses should be based on the material contained in this RFI or any other relevant information the vendor thinks is appropriate.
- By submitting a response, each vendor agrees that it will not bring any claim or have any cause of action against IFA, or any employee of IFA based on any misunderstanding concerning the information provided or concerning failure, negligent or otherwise to provide the vendor with pertinent information as intended by this RFI.

1.15 Costs to Vendors

IFA is not responsible for any costs incurred by a vendor, which are related to the preparation or delivery of the response, any on-site inspection that may be required, or any other activities related to this RFI.

1.16 RFI Responses

All printed information used to demonstrate a vendor's product becomes the property of the State of Iowa. The State will have the right to use ideas or adaptations of ideas that are presented in the responses.

1.17 Sources of Information Used in Addition to Responses

IFA reserves the right to contact vendors after the submission of responses for the purpose of

clarification and to ensure mutual understanding.

1.18 No Obligation to Issue Request for Proposal (RFP)

The issuance of this RFI does not obligate IFA in any way to issue an RFP for the goods and services described in this RFI.

1.19 Vendor Responses Identifying Information

- State the name and principal place of business of the vendor.
- Identify the vendor's type of business entity such as a corporation or partnership.
- State the vendor's place of incorporation or organization, if applicable. At the respondent's discretion, provide an organization chart for the vendor. Include any parent, subsidiary and affiliate companies you feel may be relevant to this information request.
- State the name, address, email address and telephone number of the vendor representative to contact regarding all matters concerning this RFI.

1.20 Vendor References

Please provide references for organizations in which you have implemented your services. Please include any applicable customer contact information.