Introduction
PHFA is soliciting proposals for producing our first web-based annual report. All past agency annual reports have been paper-based. We believe we should be able to gain cost savings by eliminating the printing and mailing of our report. We expect that shifting to a web-based report will offer some important advantages, such as the use of video and animation to enhance our presentation of information. Plus we are interested in learning how much our annual report is actually being read, and a web-based report should provide valuable reader analytics.

Since the agency has not created a web-based report before, this is a new experience for us. We are looking for a vendor that gives us confidence they can help us produce a report that will look professional and function properly for readers. We are also looking for a vendor that has enough experience to help us avoid pitfalls that could hurt the performance of the final product or delay our production schedule.

Vendor and agency responsibilities
In order to produce a realistic bid, it’s important that all vendors understand what part of the report’s production will be their responsibility, and what will not. PHFA has staff with journalism and TV production experience. So the agency will handle:

- Full development of the report’s content outline
- All written text
- All data charts, tables and county data “snapshots” for various PHFA programs
- Condensed fiscal data taken from the full 2020 audited financial report
- All supporting photography and video content (owned by PHFA), including captions
- Ideas to help guide the graphic design, include suggestions on color choices, animation and video content
- Any PHFA agency or program logos

The vendor will provide:

- All graphic design, including the creation of moving elements on the pages, such as a data reveal or “pop-up” when clicking on a map
- All computer code running in the background that supports the report
- Feedback during report production on ways to modify the content coming from PHFA to create the best web presentation of information
- All icons used as part of the report design
- Proofreading of the final report (following AP style) once it has been approved

Expectations for the vendor include:

- Time set aside for an early brainstorming session for planning and coordination
- The creation of three potential webpage designs for selection of one by PHFA
- The production of a final product that will be viewable by anyone coming to the PHFA website, assuming they have reasonably modern computer equipment
- The production of a final product that is ADA compliant for viewing by people with disabilities
- The establishment of a production schedule that includes dates for when different content is due from PHFA, and which also has dates for when various drafts of the report will be ready for review by the agency. This schedule should allow some buffer at various points in the schedule to provide flexibility for changes.
• We do not expect the annual report to be mobile-friendly. It should be created for viewing on tablets, laptops or PCs.

Outline for the Annual Report
We expect the annual report to consist of seven main web pages that will include, in this order:
• Cover page
• Introduction
• Our Leadership
• PHFA Housing Programs
• Fiscal Year 2020 Highlights
• State Map with production “pop-outs” by county
  ○ Includes icons for five program areas that open to reveal statewide production data
• Condensed fiscal summary

The framework for our annual report will be modeled in part after the Illinois Housing Development Authority’s 2017 annual report that can be viewed at http://ihdafy17.com/. We also like the look-and-feel of this annual report, so it provides a useful reference for setting expectations.

The theme for the annual report most likely will be “Housing First.” Traditionally this term was meant to refer to the idea that homeless people should first be provided housing after which their needs for education, addiction treatment, etc. could best be addressed. This report will broaden readers’ understanding of the phrase “Housing First” to make the point that everyone’s quality of life is best addressed when stable housing is provided so they can pursue other opportunities for self-improvement.

This annual report will cover PHFA’s 2020 fiscal year, which runs from July 1, 2019 – June 30, 2020.

Budget
Based on some preliminary research, we expect the cost of a web-based annual report to be less than that of a printed and mailed report. However, since we are new to this process, we are not going to set any budgetary expectations. To do so might keep some vendors from participating in this RFP, and we want to receive as many proposals as possible to educate us on what is available at what price. Therefore, we are not providing a budgetary cap. However, we advise vendors that price will be a significant element in our judging of proposals.

Tentative Project Schedule
The following dates are approximate:
• May 18 - RFP issued
• June 8 – Proposals due
• June 22 or earlier – Winning vendor announced
• Week of June 28 – Brainstorming meeting, project launched
• July, Aug, Sept, Oct – Production continues; financial report due from auditors in Oct.
• Nov – Finalize report
• Dec – Report posted on PHFA website before Dec. 18; email sent to business partners
Scoring of Proposals
Vendor proposals will be scored according to three main criteria:

1) The creative design: Vendors should discuss the look-and-feel of the annual report as they envision it. Color choices, typestyle, animations and more should be discussed to provide confidence in the vendor’s eye for design. Samples of similar past web work are a plus. Total possible score: 40.

2) The cost: How much will the project cost, and what is the confidence provided that the vendor can adhere to this price without cost overruns? Reviewers will examine any cost breakdowns provided and evidence of pricing by the vendor for similar past projects. Total possible score: 40.

3) Confidence in execution: Since PHFA is new to the production of a web-based report, it is important for the vendor to convince the agency that it can produce a professional and rock-solid web-based report that is on schedule, on budget, and with minimal production hang-ups. This should include contact information for three past clients willing to talk by phone with PHFA. Total possible score: 20.

Obviously, to gain the highest score, vendors should structure their proposal to specifically address these three primary areas of interest. The total overall score will be 100 points.

In the event that the top proposals are close in score, the winning vendor will be the one whose proposal succinctly outlines its plan. We are doing this to discourage overly wordy responses that add little substance but are intended to impress primarily by their length.

Vendor Proposals
Vendor proposals are considered proprietary information and will not be made public.

Background Information about PHFA
We know some firms participating in this RFP will already be familiar with PHFA. But if vendors seek additional background information, our website is the best place to start. Recent annual reports offer useful background information about the agency’s programs. (See: Homepage > Partners > Investor Information.) Press releases and our Press Kit are additional quick sources of background information. (See: Homepage > News > PHFA News Center > Reporters.) Vendors should be careful in using past paper-based annual reports as their design guide. It is expected that our 2020 e-report will have a more corporate look-and-feel.

Questions
In fairness to all vendors, any questions about this project should be submitted in writing and not communicated verbally. Please email questions to Scott Elliott at selliott@phfa.org. Answers to questions will be shared with all vendors participating in this RFP to ensure a level playing field. Knowing this, all vendors who expect to submit proposals should provide Mr. Elliott their contact information at their earliest convenience.

Deadline
All proposals are due via email to Scott Elliott no later than noon on Monday, June 8. Electronic files are encouraged in keeping with social distancing protocols, plus PHFA’s offices are currently closed to the public and to most staff.