Request for Proposals

for

Design and Development of Online Homebuyer Tool

August 2017

ABOUT THE CENTER

Launched in 2008, the Center for NYC Neighborhoods promotes and protects affordable homeownership in New York so that middle- and working-class families are able to build strong, thriving communities. We work with a network of community-based organizations (our 'Network Partners') throughout the city to amplify our services and meet homeowners' direct needs.

Since the start of the mortgage crisis, the Center has helped tens of thousands of New Yorkers navigate the challenges of keeping their homes. Our programs have helped to stabilize homeowners and neighborhoods by providing housing counseling and legal services, along with homeownership-related education and outreach, to owners of 1-4 family homes.

Yet as the needs of homeowners have evolved, so have our services. In the aftermath of Superstorm Sandy, we established the Recovery and Resiliency team to help affected homeowners repair and rebuild. We also created FloodHelpNY.org, a platform for homeowners to assess their future risk of flooding, as well as their mitigation options. In 2017, we launched the Homeowner Financial Toolkit, a resource that our Network Partners use to help homeowners at risk of foreclosure address the underlying financial issues that have contributed to their mortgage distress. After the initial implementation of the Toolkit proved successful in helping clients reduce expenses, manage debt, and build savings, we are now seeking to expand our financial capability program to help new homebuyers plan for the long-term costs of homeownership.

PROJECT OVERVIEW

The Center is seeking a firm to design and develop a free, accessible, online tool that can be used by potential homebuyers in New York City to understand and plan for the costs of homeownership. While many online resources for aspiring homebuyers exist, we believe there is a need for a user-friendly affordability tool for low- to moderate-income buyers specifically for the New York City market. In a city as expensive as New York, it is essential for aspiring homebuyers to understand the financial resources needed to meet the full cost of purchasing a home, including long-term expenses such as home maintenance and repairs, and costs specific to NYC such as condo and co-op fees.

To create this tool, the Center plans to engage a firm with expertise in interactive web application design and development. The firm will design the tool to be as simple, clear, and useful as possible, with iterative input from end-users including Network Partners and aspiring homebuyers. The tool will calculate the affordability of homeownership options based on user inputs, including their individual budget and housing expenses, while providing clear guidance on calculating and understanding the costs of homeownership. The Center has developed some initial prototypes for the tool, which can be shared with interested firms.

The tool will be introduced to aspiring homebuyers through housing counseling services offered at the Center's Network Partners. Additionally, more New Yorkers are interested in homebuying than may

attend in-person services. Therefore, the tool will also function as a stand alone online resource embedded in the Center's website that aspiring homeowners can use independently to understand their ability to afford a home in NYC. The Center is expanding our website to more effectively reach New York City homebuyers and homeowners, providing them with information that is central to buying and owning a home in New York City. The updated website with homeowner-facing content will provide context for using this financial planning tool within the homebuying process.

SCOPE OF WORK

The selected firm will be responsible for the design and development of the online homebuyer tool as outlined in Task 1 and Task 2 below:

Task 1: Research, Design and Test

The selected firm will design a simple, interactive, user-friendly online tool to be incorporated into the Center's recently redeveloped website. The Center has conducted an initial review of available online tools, discussed gaps with Network Partners, and created concept prototypes of two tools we believe would help homeowners understand and plan for the costs of homeownership. The prototypes are in Google Sheets and perform basic calculations, but have no front end design. The firm will confirm through end-user testing if either of these tools would be useful for development.

To complete this task, the selected firm will:
- Conduct limited initial research with end-users to understand needs and interest for content. Research should include 1 or 2 focus groups or surveys.
- Determine if the preliminary concepts the Center has created are worthwhile to pursue for development, or if there are additional applications that would fill the need to provide localized and personalized planning for aspiring homebuyers in NYC.
- Design at least one prototype for input from stakeholders including Center staff, Network Partners and end-users.
- Recommend one simple tool for development based on end-user research.
- Test the design with users.

Task 2: Development

Based on the findings and recommendations of the design phase, the firm will complete the following tasks for development of the online application:
- Build the tool selected through the design phase into a live application on the Center's website, which is hosted on Wordpress. The tool may also be incorporated into other apps and websites that homebuyers use to make decisions about home buying.
- Work closely with the Center's Communications team and the Center's web developer to integrate the application into the Center's website.
- Include the following functions and features:

- ○ A visually compelling, intuitive, and easy to use interactive interface
- ○ Guidance and tips for users to accurately enter inputs for the tool
- ○ Connections to local resources and information, such as housing counseling, where appropriate
- ○ Compatibility with computer web-browsers as well as mobile devices, including iOS and Android operating systems
- ○ Ability to track industry-standard website analytics through the Center's Google Analytics platform
- ○ Ability to expand at a later date to add additional content or functionality
- Test the final tool and demonstrate desired functionality
- Troubleshoot and resolve problems arising post product launch

Deliverables will include:

- Design based on Task 1, to be reviewed and approved by the Center
- Summary of findings from end-user research
- Development of the fully functional application to be housed on the Center's website as described in Task 2

The Center will provide:
- A project lead acting as project manager and day-to-day point of contact
- Interviews with Center staff as needed as well as connections to Network Partners and homeowners for user input and testing
- Background program materials and draft versions of tools that the Center has created
- Subject area expertise on homeownership in New York City and drafting of content and language for the tool
- Coordinate with the Center's web developer, who will be responsible for incorporating the tool into the Center's website
- Coordination with Center staff and consultants to house data from the tool in the Center's Salesforce instance. Note that the Center has multiple solutions to facilitate this connection, including an MS SQL Server connection, the Salesforce API, and Heroku.
- Ongoing training and support to Network Partners to ensure successful incorporation of the tool into their services
- Community outreach to promote the use of the tool

Timeline
- Completion of deliverables by December 15, 2017

AVAILABLE FUNDING
Proposals to complete the above scope of work should not exceed $50,000.

In order to be considered, all applicants must submit the following:

1. Statement of interest, detailing the organization's qualifications for this proposal and a description of relevant skills and experience. Please include examples of relevant online applications the firm has designed as developed.
2. Proposed approach, detailing anticipated tasks and a timeline to complete the project, as well as the firm's approach to application design and incorporating stakeholder input. End-user input can be obtained through qualitative research including focus groups, interviews, and/or surveys, in addition to user testing. The timeline should include launch of the online tool by December 15, 2017.
3. Price proposal including line item budget, not to exceed $50,000
4. Resumes for each employee to be staffed on this proposal
5. List of three references who can speak to the firm's expertise in application design and development, as well as the firm's experience completing similar projects on time and on budget. Please include the name of the contact and the context in which they worked with the firm.

All applications must be received by 5PM EST on Wednesday, August 30, 2017. Responses must be limited to 10 pages, excluding resumes and references. Please submit applications, and any questions about this RFP, by email to proposals@cnycn.org with the subject line: 'Online tool RFP.'

Interested parties can submit questions via email to proposals@cnycn.org until Monday August 28, 2017.

Upon receiving proposals, the Center retains the right to: negotiate specific details, responsibilities, and pricing with applicants; use its discretion in accepting or denying proposals for select parts or all of the services listed above; and award a contract to be one, multiple, or none of the applicants to fulfill the services listed above. All details regarding the program scope and Consultant's tasks are subject to contract finalization.

The Center for New York City Neighborhoods is an Equal Opportunity Employer. All qualified applicants will be considered without unlawful discrimination based on race, color, creed, national origin, sex, age, disability, gender, marital status, sexual orientation or citizenship status.