



Blueprint Communities® Initiative Program Evaluation Request for Qualifications

Issued July 12, 2018

The FHLBank Pittsburgh (Bank) is seeking proposals from qualified vendors to manage the evaluation of its Blueprint Communities (BC) Initiative in Pennsylvania, Delaware, and West Virginia.

The BC brand and logo has been trademarked by the Bank to protect the brand and preserve the association with quality programming.

FHLBank Pittsburgh

As an intermediary between global capital markets and local lenders, the Bank provides readily available liquidity, as well as affordable housing and community development opportunities, to member financial institutions of all sizes in Delaware, Pennsylvania and West Virginia. The Bank is part of the Federal Home Loan Bank System, which was established by Congress in 1932 and serves as a reliable source of funds for housing, jobs and growth in all economic cycles. To learn more, visit www.fhlb-pgh.com.

Blueprint Communities Initiative, Purpose, and Goals

Developed by and implemented by the Bank in 2005, the purpose of the BC initiative is to serve as a catalyst for the revitalization of older communities and neighborhoods.

That purpose is achieved by:

- Building strong local leadership, collaboration and development capacity;
- Developing sound local and regional planning skills, which include clear community vision statements, effective goal-setting strategies, comprehensive implementation plans and performance evaluation measures; and
- Encouraging coordinated investments in targeted communities by public and private funders.

The Bank contracts with different lead partners in each state (Partners) in order to operate the program in the Bank's three-state service area: Delaware, Pennsylvania and West Virginia. BC teams, consisting of a diverse mix of local leaders, receive leadership training and then use their skills to create and implement revitalization plans for their communities. They also receive access to a variety of funding opportunities, including priority access to some Bank products. In addition to benefitting participating communities, BC benefits Bank members by:

- Providing opportunities to support local community planning and strategy implementation
- Creating opportunities for CRA credit and community investment
- Facilitating partnerships with local/state leaders

The BC designation lasts for up to 10 years. The base year of the program, Program Year 1, involves the formation of the community teams (Teams), an assessment process where information is gathered about their communities, and a rigorous planning process, during which Team members attend monthly workshops and work together to create their BC plan. An emphasis is placed on engaging members of the community throughout the process, as well as determining how plan strategies will be implemented and results measured. Program Year 1 concludes with a graduation ceremony, and communities remain in the program for 9 more years through a recertification process, which is described in Attachment A. During the 10-year program period, teams remain eligible for continuing technical assistance, mini-grants and priority consideration for Bank Community Investment products (e.g. Affordable Housing Program).

The Bank's community investment products and 2018 funding allocations are listed below. Additional information on these products can be found on the Bank's website.

- Affordable Housing Program - \$30 million for the creation or preservation of affordable housing
- First Front Door - \$11.8 million to support first-time homebuyers
- Banking On Business - \$6 million – small business start-up or expansion
- Community Lending Program - \$1.25 billion – variety of community development initiatives
- Home4Good - \$4.8 million – support for homeless initiatives

Please refer to the Bank's website for more details about Community Investment products and the BC Initiative: <http://www.fhlb-pgh.com/blueprint-communities>

Blueprint Communities Initiative Accomplishments

The BC revitalization initiative has performed well across the Bank's three-state district:

- The Bank has graduated 58 BCs in 7 different cohorts throughout Pennsylvania, Delaware and West Virginia. Currently, there are 17 active BCs. In 2019, we anticipate an additional 3 to 6 communities to begin the program
- Delaware, Pennsylvania, and West Virginia communities have received numerous other awards and community designations
- The Bank, through its participating members, directly links participating communities with our community investment products, which have resulted in investments of more than \$16 million in affordable housing and small business funding in BCs and that investment leveraged more than \$154 million in other investments in these communities

History and Purpose of Blueprint Communities Evaluation

Purpose

The Bank has implemented a consistent approach to evaluation which can be applied across all three states. The purpose of BC evaluation is threefold:

1. To describe the impact of BC on the communities in a way that facilitates a comparison of results across communities, cohorts and states
2. To provide data that supports policy decisions and the allocation of resources by funders
3. To provide data that ultimately strengthens the program and assists participating communities in making best use of the program resources.

History

Since the creation of BC in 2005, a number of approaches to evaluation were utilized. Fluctuation in available resources for evaluation, as well as evolving ideas about what to measure and how to measure it led to a variety of approaches. A lack of common measures from year to year resulted in a moving baseline for evaluation.

Consequently, standardized evaluation tools and procedures were developed in 2016 and 2017 to ensure consistency in data collection and analysis across geographies and program years. Check-ins are conducted on an annual basis by the Bank, and more in-depth evaluations are conducted in Program Years 2 and 5. A close-out evaluation is conducted at the end of Program Year 10. The detailed evaluation procedures are described in Attachment A.

Evaluator Role and Responsibilities

The evaluator will work in connection with the Bank to execute evaluation procedures and tools developed for the multi-year BC initiative. The Evaluator's responsibilities will be to:

1. Collect baseline data for communities during Program Year 1
2. Evaluate training sessions at the end of Program Year 1
3. Conduct recertification calls during Program Years 2 and 5
4. Perform evaluations during Program Years 2 and 5
5. Update baseline data during Program Year 5 and provide summary of changes
6. Conduct close-out evaluations at year 10 or upon early exit; and
7. Provide recommendations to enhance the evaluation process and the BC initiative,

These roles and responsibilities are further described in Attachment A.

Potential respondents should be aware that the number of communities active at various stages of the BC cycle will fluctuate each year. The chart below lists the number of active communities by Program Year in 2018.

Program Year	DE	PA	WV	Total	Evaluation Activity
1	-	-	-	-	Baseline Data Collection; Training Evaluation
2	2	-	-	2	Recertification Call and Evaluation
3	-	-	-	-	None
4	-	6	-	6	None
5	-	-	3	3	Recertification Call and Evaluation; Baseline Data Update
6	-	-	-	-	None

7	-	-	-	-	None
8	1		-	1	None
9	-	-	-	-	None
10	5	-	-	5	Close-out Evaluation; Final Evaluation Report
Total	8	6	3	17	N/A

Request for Qualifications

Organizations interested in working with the Bank to evaluate its BC initiative on an annual basis are asked to submit a proposal that addresses the following:

1. Organizational Profile: Provide your organizational mission, profile and history.
2. Experience:
 - Provide a description of your organization's experience with community development or socio-economic development programs
 - Describe your specific experience relative to the scope of work specified in Attachment A
3. Personnel: Key staff to be assigned to this initiative, including relevant program evaluation experience
4. Cost: Please provide your hourly rate. Specific compensation will be determined during contract negotiations.
5. Diversity and Inclusion: Diversity and inclusion are important factors in the RFP evaluation process. In addition to the above criteria, each proposal will be evaluated for the following: (i) vendors diversity status as a minority-, women- or disabled-owned business, (ii) the inclusion of partners (and/or equity owners) who are minorities, women and individuals with disabilities in teams handling the engagement, and (iii) the utilization of minority-, women- or disabled-owned subcontractors. The submitted letter of interest should describe the partner's status as a minority-, women- or disabled-owned business, if applicable.

The Bank reserves the right to due diligence and to request additional information as warranted.

Upon review of the proposal, if it is determined that your organization has the experience and capacity to deliver high quality evaluations, the Bank will enter into the negotiation of an independent contractor agreement that will formalize the roles and responsibilities of the Bank and your organization.

The contract will be issued from August 2018 to December 2018 with the option to renew for additional years based on satisfactory performance and available funding.

Commitment to Diversity and Inclusion

The Bank is committed to providing equal opportunities in contracting and procurement regardless of race, religion, color, sex, national origin, age, disability status, genetic information, veteran's status, ancestry, sexual orientation, gender identity, or status as a parent as defined by applicable law. We expect the same commitment from our vendors.

The Bank values fair and open competition and encourages proposals from all vendors, including certified minority-, women-, and disabled-owned businesses. We actively consider diversity and inclusion when selecting vendors and encourage vendors to include in their proposal evidence of their status as a diverse vendor and/or a description of their commitment to diversity and inclusion by describing the diversity of proposed teams and subcontractors as applicable.

Equal Opportunity and Non-Discrimination Clause

In accordance with our regulatory requirements, selected vendors will be required to agree to our equal opportunity and non-discrimination clause, as well as to include such clause in any subcontract entered into for services or goods provided to the Bank.

Submission instructions:

Responses to this RFQ must be submitted by August 3, 2018 to Rhiannon Haller, Community Development Specialist, FHLBank Pittsburgh. Submission may be made by:

Regular mail: 601 Grant Street, Pittsburgh, PA 15219

Email: Rhiannon.Haller@fhlb-pgh.com

Questions can be directed to Rhiannon Haller, 412-288-3406.

"Blueprint Communities" is a registered service mark of the Federal Home Loan Bank of Pittsburgh.

Attachment A

Purpose of Recertification

Recertification occurs in Program Years 2 and 5. The purpose of recertification is to verify continuing participation in order to determine eligibility for continued benefits under the program. Recertification qualifies communities for priority consideration in funding programs and makes them eligible for technical assistance and mini-grants, if available. It also gives them the right to continue to use the BC name.

In order to successfully recertify, communities must meet the following criteria for recertification:

- The BC plan is developed and approved,
- The community is implementing the plan and indicates they will continue to do so,
- Stakeholders are convening on a regular basis to work on plan implementation, (the definition of “regular” may differ for different communities.)
- At least one Bank member is an active member of the team, and
- Team members are willing to commit to participating in future evaluation and measuring progress.

Recertification questions will be asked via telephone interviews by the Evaluator. While the Evaluator will gather and provide the data regarding each community, the Bank will ultimately make the determination about whether each community is eligible to recertify. Communities that are determined to be eligible to recertify will then be evaluated before recertification is granted. Recertification is not contingent in any way upon the actual results of the evaluation. Rather, it is simply a requirement that communities participate in evaluation in order to recertify and retain their eligibility for benefits. Even if communities are determined to be ineligible for recertification, they will still receive a close-out evaluation which will mark the termination of their participation in the program and their eligibility for continued benefits.

Scope of Work

Item 1: Training Evaluation

At the end of the training, the Evaluator will collect feedback from all team members about the program, including lessons learned and suggestions for improvement and provide a report to the Bank within 60 days of graduation. Information may be made available to the state partners as well.

Item 2: Baseline Data Collection

The Evaluator will collect baseline data for a set number of long term indicators at the census tract level and provided to the teams at the beginning of the training program as part of their community profile:

Economic indicators

- Median household income
- % of families living below the poverty line
- Unemployment rate

Housing indicators

- % of vacant housing units
- % of homeownership
- median housing price
- median price of rental housing

Business indicators

- % of vacant commercial space
- Median price of commercial rental units

Data for the long-term indicators will be collected again by the Evaluator in year 10 during the evaluation process for any recertified teams.

Teams may identify additional indicators that they wish to measure, and customize their profile with the additional data. If this happens it will be the responsibility of the Team to gather and track this data.

Item 3: Long-Term Indicator Data Collection and Evaluation – Program Year 5

The Evaluator will update baseline data for the long term indicators that were provided to the teams at the beginning of the training program as part of their community profile (see Item 2) and provide a summary of the changes.

Item 4: Post-Graduation Evaluation – Program Years 2, 5, and 10

Recertification and evaluation are done together in a two-step process occurring within a 90-day period for all communities in Program Years 2 and 5.

1. The Partner will provide contact information for active team members and an update on what has occurred since the last contact
2. The Evaluator will conduct phone interviews with active members to see if they are still active and engaged. The Bank will provide the questionnaire for the phone interviews and will assess the results.
3. The Bank will provide the Evaluator with a list of communities and their recertification status.
4. If recertified, they are scheduled for an evaluation. See Evaluation Procedures below for more details.
5. If communities are not recertified, they are scheduled for a close-out evaluation and are no longer eligible for program benefits. See Close-Out Evaluation Procedures below for more details.
6. Close-Out Evaluations are also conducted for communities remaining in the program at the end of Program Year 10.

Evaluation Procedures

- The contact information provided by the State Partner, and validated/updated in the recertification interviews, will be used to contact all community members active in BC plan implementation and projects. The Evaluator will send out via email the evaluation survey, which will be completed in Excel by the team leader within 12 days. The Bank will provide the email script and Excel survey tool.

- The Evaluator will send reminder emails and compile the results of the survey.
- The Evaluator will make a follow up call to the team leader to clarify any discrepancies and obtain answers to any remaining questions.
- The Evaluator will provide a detailed report of all communities that are evaluated. The Evaluator will also prepare a concise summary version of the report to share with funders, Bank partners, participating communities and other key stakeholders.

Close-Out Evaluation Procedures

The same evaluation process will be followed for close-outs, using a different Excel survey tool provided by the Bank.

Prior to compiling the final report, the Evaluator will update the baseline statistics obtained during the first and fifth program years for analysis and discussion in the final report.