



Enterprise Community Partners Request for Proposal (RFP): Web Agency

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1. Introduction and Project Overview

a. RFP Purpose

Enterprise Community Partners, Inc. (Enterprise) has initiated a Request for Proposal (RFP) process to select a **website design and development agency of record** to support ongoing web-related work with Enterprise in various capacities.

We are seeking to identify an expert partner agency who can support our primary website, [EnterpriseCommunity.org](https://www.EnterpriseCommunity.org), in addition to other Enterprise website-related projects, listed below, in an ongoing fashion.

Note: The purpose of this RFP is to support an existing ecosystem of websites with incremental improvements, optimizations, and ongoing maintenance. Although we are not undertaking a redesign or re-launch of our main website at this time, we expect to tackle this as a significant initiative within the next several years, preferably with the selected agency partner. Applicants should demonstrate their ability to undertake this work, as well as the primary scope of work.

b. About Enterprise Community Partners

Enterprise is a national nonprofit that exists to make an affordable home possible for the millions of families without one. We support community development organizations on the ground, aggregate and invest capital for impact, advance housing policy at every level of government, and build and manage communities ourselves. Since 1982, we have invested \$80.9 billion and created 1 million homes across all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands – all to make homes and community places of pride, power, and belonging.

Enterprise is focused on three priorities where we can make the greatest impact on systemic challenges so that people not only make rent, they build futures. These priorities are to:

- 1. Increase Housing Supply**
Every day, we fight to put good homes within reach. We invest in and advocate for the preservation and production of quality homes that people can afford.
- 2. Advance Racial Equity**
Dismantling the enduring legacy of discriminatory policies, practices and investments in housing has become central to the work we do.
- 3. Build Resilience and Upward Mobility**
We strengthen people and places to prepare for and recover from shocks to ultimately promote stability, well-being, and upward mobility.

Our multi-dimensional, end-to-end approach is one of our greatest strengths and differentiators and brings together in one organization the full range of capabilities to address America's affordable housing crisis. Specifically, we:

1. invest in creating and preserving affordable homes.
2. own and operate rental homes and provide resident services.
3. advocate for policy and best practices that drive systems change.
4. operate on a national scale with a local, on-the-ground presence.
5. work with more than 2,000 partners to design, test and scale solutions.

c. Existing Website Ecosystem & Capabilities (In-House & External)

Enterprise's ecosystem of website properties includes a primary website, EnterpriseCommunity.org, as well as a number of related websites and microsites. The strategy, architecture, content, and planning for these websites is currently handled by Enterprise's in-house digital team, which will continue to oversee and direct the website experience. Enterprise currently works with a website agency-of-record partner for front-end and back-end development and maintenance of its sites (mostly built in Drupal 10), as well as occasional site design, user experience, analytics and SEO needs.

d. Goals and Audience

The Enterprise Digital team seeks to both drive and support the following goals:

1. Build awareness and **shift the narrative** around affordable housing
2. Establish, differentiate, and reinforce Enterprise **brand and credibility**
3. Initiate and enable **policy and legislative change**
4. Acquire and build **relationships** and cultivate **partnerships**
5. Drive more **funding and attract investors**
6. **Build capacity** in the network via trainings, technical assistance, thought leadership, and services
7. **Mobilize advocates** to advance the movement for affordable housing
8. **Enable a data-driven, research-informed learning environment** for continuous improvement and optimization

Enterprise seeks to reach and engage a diverse ecosystem of audiences through our web properties, including (but not limited to):



Fig 1. Enterprise Priority Audience Definitions

Further details about our audiences can be found in [Appendix A](#).

2. Scope of Work and Deliverables

The capabilities and partnership components we are looking for from a web agency will complement in-house capacity and skills. They include:

- Web Strategy and Account Leadership
- User Experience, User Interface, Audience Research, Usability and Accessibility
- Front-End, Back-End, Drupal and Website Technical Skills
- Web Support and Retained Partnership Model
- Related Web and Digital Expertise (e.g. SEO, Analytics, Content Strategy and Governance)

a. Agency Capabilities

i. Web Strategy and Account Leadership

- **Digital engagement strategy:** Developing or implementing comprehensive web-based strategies to maximize audience reach and engagement while integrating web initiatives with broader communication and marketing efforts (e.g. email, social, paid media).
- **Multi-site strategy:** Proposing ecosystem strategy for managing complex, interconnected web properties under a unified governance framework.
- **Collaboration with other vendors/agencies:** Working seamlessly with other Enterprise agency partners and vendors to ensure alignment and coordination across all digital initiatives.
- **Optimization of existing sites and microsite consolidation:** Expertise in both enhancing existing websites through strategic and technical improvements and in delivering complete, end-to-end web strategy, design and development projects.

ii. User Experience, User Interface, Audience Research, Usability, and Accessibility

- **User experience and User Interface:** Designing intuitive, visually engaging, and mobile-optimized user experiences that prioritize ease of use across all devices.
- **Brand-aligned web design:** Producing compelling digital designs based on Enterprise brand identity and standards.
- **Audience Strategy/Segmentation:** Providing thoughtful input on how the website can be leveraged as part of multi-channel strategies to engage priority audiences.
- **Usability testing and user research:** Conducting structured usability testing to identify barriers, improve user flow, and validate design decisions with real users.
- **Information architecture:** Organizing and structuring website content and navigation to optimally support user needs, content strategy, and organizational goals.
- **Web accessibility:** Ensures web experiences meet or exceed WCAG 2.1 AA standards to support inclusive access for all users.

iii. Front-End, Back-End, Drupal and Website Technical Skills

- **Front-end development:** Delivering modern, high-performance front-end web experiences using best-in-class technologies (HTML5, CSS3, JavaScript, PHP, etc.).

- **Back-end development:** Building secure and scalable server-side systems and maintaining reliable staging and development environments.
- **CMS:** Specializes in building and maintaining robust, flexible website architectures and infrastructures using industry-leading CMS'es (such as Drupal) with an eye towards stability, site sustainability, and reducing technical debt.
- **Application Integrations:** Supporting integrations with other, established and future Enterprise platforms, such as Salesforce CRM, Salesforce Marketing Cloud, Classy/GoFundMe Pro, Cvent, Yardi, digital advocacy, payment processing and other systems, to streamline data flow and enhance user experience.
- **Website speed and performance optimization:** Continuously monitoring and refining site performance to ensure fast load times and optimal user experiences.
- **Maintenance, security, and compliance:** Providing ongoing maintenance and ensuring website security, legal and regulatory compliance, and platform reliability through regular updates and monitoring.
- **Hosting and DevOps:** Managing hosting infrastructure and DevOps processes to ensure uptime, scalability, and efficient deployment workflows.

iv. Related Web and Digital Expertise

- **Content strategy and governance:** Providing guidance on content creation, management, and workflows to support consistency, accuracy, and alignment with organizational goals.
- **Site analytics:** Providing regular updates and analytics via Google Analytics, Google Tag Manager, and other platforms to track site performance and provide actionable insights for ongoing improvements.
- **Multivariate/A/B testing:** Designing and executing testing strategies to evaluate and refine digital experiences based on real user behavior.
- **SEO and content performance:** Providing ongoing guidance to enhance search visibility and site traffic, advising on emergent trends in AI-powered search and establishing semantic authority.
- **Documentation for content editors:** Producing user-friendly guides and training materials to support content editors in managing site content confidently and efficiently.

v. Web Support and Retained Partnership Model

- **Close, collaborative working relationship:** Maintaining a proactive, communicative partnership model to ensure alignment and transparency.
- **Strong, articulated project management approach:** Employing proven project management methodologies (e.g. agile, waterfall, hybrid) to deliver projects on time, within scope, and with agility.

- **Easy request management/ticketing:** Utilizing a user-friendly ticketing system, such as Atlassian Jira, for efficient handling of content updates, technical issues, and enhancement requests.
- **24-hour emergency site-support model:** Providing round-the-clock emergency response to minimize downtime and protect mission-critical web services.
- **Service Level Agreements:** Adhering to clearly defined response times and service level agreements (SLAs) to ensure timely and reliable support.
- **Proactive communications and project updates:** Delivering consistent updates and status reports to keep stakeholders informed and engaged.

b. Agency Experience

Required

i. Nonprofit and/or Think Tank Clients

Enterprise is a national nonprofit organization with 3 key components of our mission:

1. **programmatic, policy, and capability-building work** to advance and enable affordable housing;
2. **aggregating and investing capital** in homes and communities to achieve impact and returns; and
3. **building, preserving, and managing** affordable homes and communities.

We operate as a nonprofit organization with many coordinated parts serving a united theory of change, including our presence in local markets and our support of community development organizations. Our web agency must have some experience with nonprofit and/or think tank clients, B2B and B2C content, and an understanding of related business practices (e.g. engaging expert audiences in their work; targeting beneficiary audiences such as residents; engaging both constituents and partners; and communicating to funders about complex and interrelated aspects of a theory of change).

ii. Expert/B2B Marketing

The most established segment of Enterprise’s external audience is a strong and growing network of professional experts who use our organization as a partner for resources, training, education, and advancing their work. This will continue to be a high-priority focus area for us, which means that much of our web communications work is “expert to expert,” similar to B2B marketing in the for-profit world, in addition to our work to target more mass/mainstream audiences. Our agency partners must understand the nuances of B2B content, marketing and communications, where getting the **right** audience profiles to take the **right** actions is just as important as engaging a large number of constituents.

Nice to Have

iii. Fundraising

As a nonprofit organization, a significant portion of our revenue comes from fundraising, primarily through strong, one-to-one relationships with institutional donors and, aspirationally, high-net-worth individuals. While our web agency partner does not need to be registered fundraising counsel, the chosen agency will have strong exposure to and understanding of fundraising practices and the donor lifecycle — from prospect acquisition to cultivation to solicitation, stewardship, and renewal, at all levels of the donor pyramid, from digital platforms such as Enterprise websites to offline donations.

iv. Movement or Advocacy Experience

Enterprise aims to change the affordable housing landscape at all levels, from federal to state and local policy. We have historically worked primarily at the “grasstops” level, but we also work in coalition and partnerships on targeted grassroots initiatives. Advocacy is a key part of our theory of change, as is narrative-shift work to influence public perception of affordable housing. We seek a web agency with exposure to movement-based approaches that incorporate the full spectrum of influence — from policy to public opinion.

v. Real Estate and/or Affordable Housing Experience

We are affordable housing experts who also serve as one of the Mid-Atlantic region’s largest providers of affordable housing. Web agencies with experience in real estate marketing, property development, property management, finance and/or investment, with an understanding of the contemporary housing landscape in the U.S. and property management platforms, such as Yardi, will be given particular consideration.

vi. Other Experience

Scale: As a large organization, Enterprise seeks firms with the experience, capabilities, and bandwidth to serve us as we scale and the ability to provide flex/surge/special project capacity when the need arises.

Government Contracting: While not a firm requirement, agencies with experience navigating U.S. government contracts, procurement processes, and reporting requirements will be given preference.

c. Partnership Fit

The Digital team considers its agencies to be an extension of our team and a critical part of our staffing model. Therefore, the inter-team working dynamic will be an important part of choosing the best agency partner.

We invite your perspective on what makes for an ideal agency-client partnership. Please tell us:

- What are the key characteristics of your ideal client?
- How does your agency like to work with clients in an ongoing, retainer-based way? What about for special projects?
- What experience do you have working with clients who have a “best in class,” multi-agency model?
- What type of relationship structure does your agency believe sets a partnership up for success?

3. RFP Response Components

a. Agency Background

Provide overview information about your agency, including years in business, ownership model, number of employees, number of nonprofit clients versus total number of clients, and any information on overall agency strengths and orientation.

b. Experience and Capabilities

Please share with us your agency’s experience, capabilities, and cultural-fit information according to the section structure above. If a particular requirement isn’t a strength or your agency doesn’t have that experience, please just include that item and a note accordingly (e.g. “SEO: not a current capability”).

In addition, provide high-level information about any other areas of expertise that your agency possesses, which you think that Enterprise could benefit from understanding.

c. Client List

Provide a selection of current clients. We understand that due to contractual terms, you may not be able to share a full client list, so please just give us a sense of some of your larger and smaller clients, with particular attention to examples in the nonprofit, think tank, B2B, and/or real estate spaces.

d. Pricing Model

We seek to understand your agency's pricing model, in particular your rates for different types of services (e.g. strategy, technical production, content population, account management, support). Please provide us with overview information on how you price client engagements (both retainers and projects); whether you work with a rate card, fixed pricing or another model; and all associated rates and costs. Please also share your agency's approach to hours overages, along with any specific detail regarding your payment terms and schedule. We will work with finalist agencies to define a specific scope of work and finalize contract pricing.

e. Case Studies

Please share 3 or more case studies or work examples from a current or past client website(s). We are interested in a range of examples of large, complex websites serving a number of different audiences. We would like to see websites that you have strategized, designed, built and supported, as well as any examples you can share of websites that you did not architect or design but have successfully supported and optimized over time as the agency partner.

f. Staff Bios

Please share bios for the profiles of staff that you expect would be assigned to work with Enterprise, if chosen as our web agency. We are aware that it may be too early to commit which specific staff would work with us; however, if you are selected as a finalist agency, we will ask to meet and interact with the staff that would be assigned to our account. For the purposes of this proposal, please provide sample, representative bios.

4. Selection Criteria

Applicants will be evaluated on the following characteristics:

a. Capabilities – 20%

- The applicant has the expertise and qualifications necessary to successfully support Enterprise with its web projects.

b. Experience – 20%

- The applicant has prior experience working with similar organizations, issues and client programs.
- The proposal demonstrates an understanding of the client's strategic objectives.

c. Partnership Fit - 20%

- The proposal articulates clearly how the agency works with its clients, expectations from clients, service level commitments, and standards for ongoing collaboration.

d. Experience and Past Performance– 20%

- Demonstrated expertise as evidenced by professional certifications, accreditations, or industry recognition.
- Quality of submitted work examples.
- Past relevant experience and performance of similar projects and ongoing support services.

e. Pricing Model – 20%

- The proposed cost structure is reasonable and in line with market rates for different types of web-related services.

In addition, Enterprise may contact references to confirm quality of work and a history of responsiveness and good communication skills. Enterprise will select the proposal which it determines will deliver the highest quality deliverable at the best value. Proposals will be evaluated using the weighted-criteria identified above. The award will be made to the highest scoring applicant. Finalists will be asked to complete and submit answers to the Enterprise Vendor Risk Assessment and Data Sharing questionnaires.

Enterprise, in its sole discretion, may request proposal interviews or presentations by meeting with any and all applicants to clarify or negotiate modifications to proposals. However, Enterprise reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the applicant can propose.

After selecting the highest scoring applicant, Enterprise will engage in a scoping exercise to develop a detailed statement of work based on 2026 priorities.

5. Submission Instructions

Proposals are due by 11:59 P.M. ET on Friday, September 5, 2025.

Inquiries concerning this RFP should be submitted via [webform](#) no later than by 11:59 P.M. ET on Wednesday, August 13, 2025.

a. Format Requirements

Please provide one PDF document addressing all the components in Section 3. We request responses in PDF format. Please be mindful of the length of your responses, so that we may review all submissions and reply to agencies in a timely manner.

Please submit your response via Slideroom <https://enterprise.slideroom.com/#/permalink/program/85039> by 11:59 P.M. ET on Friday, September 5, 2025.

IMPORTANT: SlideRoom will automatically save the Applicant's work. That means that even if the Applicant loses an internet connection or has computer problems, the work will still be saved. Applicants can also log in and out as many times as they need to complete their application. However, once an Applicant submits their proposal, they cannot go back to make any edits. Applications received outside of SlideRoom or after the deadline will not be accepted. Questions regarding technical issues with SlideRoom may be sent to support@slideroom.com.

All costs incurred in the preparation of a response to this RFP are the responsibility of the applicant and will not be reimbursed by Enterprise Community Partners, Inc. By submitting a proposal, the applicant commits to the terms and conditions outlined in this RFP. Requests for exceptions to any terms or conditions must be submitted with the proposal. Enterprise reserves the right to deny requests for exception to any terms and conditions. Requested exceptions will be factored into Enterprise's consideration of award.

b. Questions and Answers

All questions regarding this Request for Proposal (RFP) must be submitted in writing via [webform](#) by 11:59 P.M. ET on Wednesday, August 13. Questions should reference the specific RFP section where clarification is needed. No verbal questions will be accepted or answered. All submitted questions and the official written responses will be distributed to all prospective applicants via email and posted online.

c. Right to Reject

Enterprise reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP. A contract for the accepted response will be based upon the factors described in this RFP.

d. Confidentiality

If the applicant deems any materials submitted to be proprietary or confidential, the applicant must indicate as such in the relevant section(s) of the response.

e. Notification of Selection and Timeline

Important Dates

RFP Opens: Tuesday, July 22, 2025

RFP Questions must be submitted by: 11:59 P.M. ET, Wednesday August 13, 2025

RFP Closes: 11:59 P.M. ET, Friday, September 5, 2025

Proposal Review: September 8 - September 19, 2025

Notification of agencies that are finalists: September 22, 2025

Presentations and focused discussions from/with top agencies: September 29 – October 8, 2025

Notification: October 20-24, 2025

f. Conflict of Interest

The applicant must disclose, in an attachment to the proposal, any possible conflicts of interest that may result from the award of the contract or the services provided under the contract. Except as otherwise disclosed in the proposal, the applicant affirms that to the best of its knowledge there exists no actual or potential conflict between the applicant, the applicant's employees or their families' business or financial interests ("interests") and the services provided under the contract. In the event of any change in either interests or the services provided under the contract, the applicant will inform Enterprise regarding possible conflicts of interest which may arise as a result of such change and agrees that all conflicts shall be resolved to Enterprise's satisfaction, or the applicant may be disqualified from consideration under this RFP. "Conflict of interest" shall include, but not be limited to the following:

1. Giving or offering a gratuity, kickback, money, gift, or anything of value to an Enterprise official, officer, or employee with the intent of receiving a contract from Enterprise or favorable treatment under a contract.
2. Having or acquiring at any point during the RFP process or during the term of the contract, any contractual, financial, business, or other interest, direct or indirect, that would conflict in any manner or degree with applicant's performance of its duties and responsibilities to Enterprise under the contract or otherwise create the appearance of impropriety with respect to the award or performance of the contract; or
3. Currently possessing or accepting during the RFP process or the term of the contract

anything of value based on an understanding that the actions of the applicant or its affiliates or interests on behalf of Enterprise will be influenced.

6. Attachments

Attachment 1: Enterprise Standard Terms & Conditions

ATTACHMENT 1

STANDARD TERMS AND CONDITIONS

All capitalized terms used herein, unless otherwise specifically defined in these Standard Terms and Conditions, shall have the meanings ascribed to them elsewhere in the Contract (e.g., on the face sheet).

1. **Conditions to Contracting.** As a condition to this Contract being effective, Enterprise must have received (a) a completed and signed W-9 form with a Contractor name that matches the Contractor name on this Contract, (b) ACH or other payment information with an account or payee name that matches the Contractor name on this Contract, (c) a certificate of insurance (ACORD 25) evidencing that Contractor has the insurance coverage required in Attachment 2 (unless otherwise approved in writing by Enterprise), and (d) this Contract signed by all parties.
2. **W-9 Form / Federal Tax Identification Number / Name Change.**
 - a. Contractor certifies that the W-9 form submitted to Enterprise for this Contract is the current W-9 form for Contractor. Payment will be made payable to the Contractor name and Federal Tax Identification number on the W-9 form. Contractor hereby agrees to notify Enterprise immediately upon any change of information on Contractor's W-9 form.
 - b. In the event Contractor desires a name change for this Contract or for any payment method because of Contractor's name change, merger, or other circumstance, Contractor must promptly notify Enterprise in writing of the name change. Enterprise will then work with Contractor to obtain the applicable documentation needed by Enterprise to make the change for this Contract. Any name change will be implemented through a Contract amendment signed by Enterprise and Contractor. No payments will be made in a different name without the name change process being completed, including the Contract amendment. If Contractor desires to assign this Contract, see the Section on "Delegation; Assignment" in these Standard Terms and Conditions.
3. **Scope of Work and Contractor's Performance.**
 - a. Contractor's performance must be in accordance with the Scope of Work. Contractor shall render its services in accordance with generally accepted professional standards and practices utilized by persons engaged in providing services of a like nature and complexity and as otherwise required by the deliverables set forth in the Scope of Work (the "Deliverables") and standards set by this Contract. If the performance of the Scope of Work or the quality of the Deliverables does not meet the obligations contained in this Contract, Enterprise reserves the right to avail itself of all administrative, contractual, legal and equitable remedies. In the

instance of poor performance or lack of quality of Deliverable, Enterprise will make good faith efforts to resolve issues with the Contractor prior to proceeding with termination rights or exercising other remedies.

- b. Unless otherwise explicitly approved by Enterprise, Contractor may not engage in lobbying or political activities under this Contract. Generally, lobbying is defined as communications with a legislator or an employee of a legislative body for the purpose of influencing legislation, and the communication refers to a specific piece of legislation and expresses a view on that legislation. Lobbying is further defined as any attempt to influence specific legislation by encouraging the public to contact legislators about that legislation. See Treasury Regulations § 56.4911-2. Political activities are defined as participating or intervening in any political campaign on behalf of (or in opposition to) any candidate for public office. See Internal Revenue Code Section 501(c)(3).
4. Benefits/Insurance. Enterprise is not responsible for any fringe benefits or insurance, including, but not limited to, social security, workers' compensation, state unemployment, federal and state income tax withholdings, retirement, leave benefits, commercial general liability and other insurance coverage, for Contractor or employees of Contractor. Contractor assumes full responsibility for the provision of all such insurances and fringe benefits for Contractor and all of Contractor's employees. Contractor maintains, and must maintain throughout the term of this Contract, the insurance coverages as set forth on Attachment 2 (unless otherwise approved in writing by Enterprise).
5. Ownership of Deliverables. Contractor hereby agrees and acknowledges that all Deliverables and other documents generated, developed or produced by Contractor under the Scope of Work of this Contract and the copyrights thereto, are the sole and exclusive property of Enterprise (collectively, the Deliverables and other documents, the "Work Products"). Contractor must not reproduce, publish or otherwise use the Work Products or any portion thereof, or allow others to reproduce, publish, or otherwise use the Work Products or any portion thereof, without the prior written consent of Enterprise. Contractor retains all rights of ownership and use over any form documents, models or training materials that are developed independently by Contractor in the normal course of its business and are adapted by Contractor to create the Work Products.
6. Use of Enterprise's Intellectual Property. Contractor shall not use Enterprise's name, logo, trademarks, or any other Enterprise-owned intellectual property for any reason, without the prior written consent of Enterprise.
7. Confidential Information.
 - a. "Confidential Information" is information which a party (the "Disclosing Party"), has identified as confidential or that reasonably should be understood to be confidential given the name of the information and circumstances of disclosure, including, but not limited to: borrower, grantee, subcontractor/contractor or client/customer information; information regarding the Disclosing Party's financial and strategic planning; Personally Identifiable Information (as defined herein); information regarding the Disclosing Party's staffing; and other data, files, and/or other material, whether such information is both tangible and intangible, in writing or orally imparted. The other party (the "Receiving Party") hereby agrees that it will not disclose or divulge the Disclosing Party's Confidential Information or any part thereof to any other person or entity (except to its employees, officers, directors or others who need to have access to the Confidential Information to complete the Scope of

Work (each, a “Receiving Party’s Representative”) or use any Confidential Information for its pecuniary benefit or for any other purpose without the prior written consent of the Disclosing Party. In the event of disclosure to the Receiving Party’s Representative, the Receiving Party is responsible for any breach of confidentiality by the Receiving Party’s Representative.

- b. Upon the request of the Disclosing Party or upon the expiration, cancellation or termination of this Contract, the Receiving Party shall promptly deliver to the Disclosing Party all documents or other materials in the Receiving Party’s possession, and all copies thereof, constituting or containing Confidential Information.
 - c. For purposes of this Contract, “Confidential Information” shall not include the following: (1) information which is or becomes publicly available without fault on the part of the Receiving Party disclosing such information; (2) information which is already in the Receiving Party’s possession prior to the effective date of this Contract and is not otherwise Confidential Information; (3) is independently developed by the Receiving Party outside the scope of this Contract and without references to Confidential Information; (4) is rightfully obtained by the Receiving Party (and not through the Disclosing Party) from third parties who are not known to the Receiving Party to be subject to a confidentiality obligation and does not otherwise constitute Personally Identifiable Information; or (5) is demanded by a valid court order or subpoena or disclosure of which is required under applicable law or regulation, *provided, however,* that the party served (“Party Served”) with any interrogatory, request for information or documents, subpoena, deposition, civil investigative demand or other process will provide the other party with prompt notice of the requested disclosure, if counsel for the Party Served determines that such notice is permitted by law, so that the other party may seek an appropriate protective order or waive compliance with the provisions of this Contract.
 - d. This Section will survive completion, expiration, cancellation or termination of this Contract.
8. Personally Identifiable Information. Contractor represents, warrants and covenants that, as of the date of this Contract and for the duration of the Period of Performance, Contractor has implemented and maintains reasonable security procedures and practices that are: (i) appropriate to the nature of the Personally Identifiable Information (as defined herein), if any, disclosed under this Contract; and (ii) reasonably designed to help protect the Personally Identifiable Information from unauthorized access, use, modification, disclosure, or destruction; and (iii) compliant with any applicable state and territory regulations.

Personally Identifiable Information shall be defined as any information pertaining to an individual that can be used to distinguish or trace a person’s identity such as name, email address, home address and phone number. Personally Identifiable Information includes the following, it being understood that this list is not exhaustive and may be defined otherwise under the laws of the applicable jurisdiction:

- Social Security Number—inclusive of the entire number of the last 4 digits;
- Driver’s License Number or State ID Number;
- Passport Number;
- Alien Registration Number;
- Financial account numbers;
- Email addresses;
- Phone numbers;

- Image;
- IP address;
- Mother's maiden name; and/or
- Any such information as would reasonably be expected to have the same protection as the foregoing examples in Contractor's industry.

Contractor agrees to keep all Personally Identifiable Information physically within the borders of the United States and the United States Territories. In the event Contractor stores its data outside of the United States and the United State Territories, Contractor (1) must notify Enterprise in writing of such data storage arrangement, including the country, territory or jurisdiction where stored; and (2) represents, warrants and covenants that Contractor (and its data storage contractor(s), if any) is compliant, and shall remain compliant during the Period of Performance, with the Global Data Protection Regulation or any other international privacy laws for data protection that are in force in the country, territory or jurisdiction in which the data is stored. Contractor shall remain liable to Enterprise for the full performance of all obligations under this Section, notwithstanding any arrangement with a data storage contractor.

Contractor shall notify Enterprise of any discovery of a breach of any Personally Identifiable Information security procedures as quickly as possible without unreasonable delay and in no event later than thirty (30) days from the discovery of the breach.

This Section will survive completion, expiration, cancellation or termination of the Contract.

9. Information Security and Audits. Contractor certifies that it is in compliance with industry-recognized standards for information security that are applicable for Contractor's line of business and the tasks associated with the Scope of Work. Contractor shall conduct, at its own expense, regular audits of its information security program in accordance with such standards. In addition, upon request of Enterprise, and no more than once per calendar year unless a security incident has occurred, Contractor shall provide Enterprise with a copy of its most recent independent information security audit report, including, if Enterprise requests, a SOC2 (Service Organization Control Type 2) or equivalent report. If Contractor is not required by law or industry regulations to obtain and maintain an independent information security audit report, Enterprise in its sole discretion can request either: (i) an internal self-assessment audit report based on recognized industry standards; or (ii) a completed Enterprise Third-Party Vendor Management Questionnaire. Enterprise will treat the copy of any such audit as Contractor's "Confidential Information" as defined by the Standard Terms and Conditions and will hold it in accordance with the confidentiality provisions of the Standard Terms and Conditions.
10. Return of Documents. Upon Enterprise's request upon the completion, expiration, cancellation, or termination of this Contract, subject to payment of all rightfully due compensation, Contractor must deliver or, with Enterprise's consent, destroy all records, notes, data, memoranda, models and equipment, of any nature, that are in Contractor's possession or under Contractor's control and that are Enterprise's property or relate to Enterprise's business (the "Enterprise Materials") and destroy any Enterprise Materials that cannot be delivered back to Enterprise, including, without limitation, Personally Identifiable Information. Contractor may retain Enterprise Materials if required by applicable law, regulation or documented Contractor archival policy or as otherwise authorized or instructed by Enterprise. Upon request of Enterprise, Contractor shall deliver to Enterprise a certificate executed by an officer of Contractor certifying that all Enterprise Materials have been delivered to Enterprise, destroyed or otherwise managed in accordance with this Contract.

11. Right to Audit/Record Retention. Contractor must keep for a minimum of three (3) years from the end date of the Period of Performance (a) accurate documentation in connection with the Scope of Work to be performed herein, and (b) a legible set of books of account in accordance with generally accepted accounting principles. To the extent allowed by law, Contractor's documentation and books of account shall be open for inspection by Enterprise or its auditors with reasonable prior notice to Contractor to assure that the work has been properly performed and that funds are being paid in the proper manner for the work performed. Notwithstanding the foregoing, in the instance of a fixed price contract, books of account will not be audited.
12. Compliance with Laws. Contractor shall comply with the requirements of all laws, rules, regulations and orders of any governmental authority applicable to it or the services being provided under this Contract, including without limitation, the data privacy laws of any state in which Contractor shall be providing such services. Contractor shall not take any action in violation of any applicable legal requirement that could result in liability being imposed on Enterprise.
13. Non-Discrimination. Enterprise and Contractor and all Contractor's subcontractors shall abide by regulations that prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and, prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity or national origin.
14. Compliance with Premises Rules, Practices and Policies. When Contractor or its subcontractor or other agent or representative is physically present on any property of Enterprise in the performance of the Scope of Work, Contractor shall make reasonable efforts to cause its employees, subcontractors or other agents or representatives to become aware of, and be in full compliance with, the property owner's rules, practices, and policies. For example, each person must comply with all applicable rules regarding Covid-19 or other health-related protocols, safety, smoking, noise, access restrictions, parking, security, and consideration for minors (persons under age 18). Contractor is responsible for any breach of this Section by its employees, subcontractors or other agents or representatives.
15. Representations; Warranties; Covenants. Contractor represents, warrants and covenants that:
 - a. Contractor, if it is an entity, is duly organized, validly existing and in good standing under the laws of the jurisdiction of its organization or incorporation; if Contractor is an entity and is performing work in a state that is different than the state in which Contractor was organized (the "Foreign State"), Contractor is qualified as a foreign entity to perform work in the Foreign State;
 - b. Contractor has full power, authority and legal right to execute, deliver and perform the obligations of this Contract;
 - c. All authorizations, consents, approvals and licenses of, and filings and registrations with, any governmental authority required under applicable law or regulations for Contractor to perform this Contract have been obtained and are, and will remain during the Period of Performance, in full force and effect and are available to Enterprise upon request;
 - d. This Contract constitutes a legal, valid and binding obligation, enforceable against Contractor in accordance with its terms;

- e. Contractor has no direct or indirect interest, whether said interest be personal or financial, that would conflict in any manner or degree with the awarding of or performance of this Contract; that no trustee, director, officer or staff member of Enterprise has any actual or potential involvement, interest or relationship in Contractor, either directly or indirectly, , whether said interest be personal or financial, and whether such interest arises by way of a corporate entity, partnership, or otherwise; and Contractor shall immediately notify Enterprise in writing of any potential conflict of interest or any relationship or actions that might give the appearance that a conflict of interest exists.
- f. Contractor represents that it has not knowingly employed individuals or contributed funds to organizations that support terrorism or that are found on any terrorist-related list promulgated by the U.S. Government, the United Nations, or the European Union, including the U.S. Department of Treasury's Office of Foreign Assets Control Specially Designated Nationals List. Contractor will not use funds provided under this Contract, directly or indirectly, in support of activities (i) prohibited by U.S. laws related to combatting terrorism; (ii) with or related to parties on the List of Specially Designated Nationals or (iii) with or related to countries against which the U.S. maintains a comprehensive embargo, unless such activities are fully authorized by the U.S. government under applicable law and specifically approved by Enterprise in its sole and absolute discretion. Further, Contractor represents that it is not the target of economic or trade sanctions, and Contractor will immediately inform Enterprise if Contractor becomes the target of economic or trade sanctions, including any ownership or control of Contractor by one or more persons on the List of Specially Designated Nationals.

16. Termination.

- a. Termination by Mutual Agreement. This Contract may be terminated at any time by mutual written agreement of Enterprise and Contractor. Such agreement shall specify the termination details including, but not limited to, the termination date, process for submission of completed or unfinished Deliverables, process for return or other disposition of Enterprise Materials, the amount of any mutually-negotiated payment, and, if applicable, the return of amounts advanced to Contractor prior to the termination date for future performance rendered impracticable by termination of this Contract. All obligations which were to be performed as of the termination date are discharged but any right based on prior breach of performance survives.
- b. Termination for Cause. If one or more of the events set forth in this subsection occurs, Enterprise may suspend or withhold payment to Contractor or terminate this Contract and Enterprise may proceed to protect its rights hereunder and seek to compel compliance by Contractor with the terms herein by suit at law or in equity for specific performance of any covenant, term or condition hereof:
 - i. Contractor fails to complete the Scope of Work by the end of the Period of Performance;
 - ii. Contractor fails to deliver any Deliverable or other report required under this Contract when such Deliverable or report is due and such failure continues unremedied for a period of thirty (30) days after Contractor has received written notice from Enterprise specifying such failure; and/or
 - iii. Contractor fails to observe or perform any other material term, covenant or condition contained in this Contract and such failure continues unremedied for a period of thirty (30) days after Contractor has received written notice from

Enterprise specifying such default and requiring it to be remedied or, if such failure is not reasonably capable of being remedied within such 30-day period, Contractor has not commenced remedial action and is not proceeding with diligent efforts to remedy such failure.

17. Force Majeure.

- a. No party shall be liable hereunder for any failure or delay in the performance of its obligations under this Contract if such failure or delay is on account of a Force Majeure Event. A Force Majeure Event shall mean any causes beyond a party's reasonable control, including labor disputes, civil commotion, war, riots, fires, floods, earthquakes, inclement weather, governmental regulations or controls, pandemics, epidemics, local disease outbreaks, public health emergencies, quarantines, casualty, strikes, the unavailability of labor or materials to the extent beyond the control of the party affected, embargoes, civil strife, acts of terrorism, or acts of God, in addition to any and all other events, regardless of their dissimilarity to the foregoing, deemed to render performance of this Contract impracticable or impossible under the law, in which event the nonperforming party shall be excused from its obligations for the period of the delay.
- b. Each party maintains an express duty to minimize the disruption caused by Force Majeure, and shall, as soon as reasonably practicable, give notice to the other party of the nature and impact of the Force Majeure. Should Force Majeure events delay Contractor's completion of the Deliverables and performance commitments, Contractor may be entitled to an extension for the time for completion subject to any supporting funding requirements. Any extension must be approved in writing by Enterprise. Should a Force Majeure event prevent Contractor from completing Deliverables or performing commitments under this Contract, the completion or performance shall be suspended only for the time and to the extent commercially practicable to restore normal operations. Further, Contractor and Enterprise shall endeavor to continue to perform their contractual obligations to the extent reasonably practicable and will work to adjust Deliverables or performance commitments as needed to continue the provision of services during the Force Majeure event.

18. Use of Subcontractors. If Contractor retains a subcontractor to perform any portion of the Scope of Work, Contractor must first request written approval from Enterprise, such approval not to be unreasonably withheld or delayed. Any such subcontractors must agree in writing to be bound by the terms and conditions of this Contract that apply to the subcontractor's scope of work and deliverables, including but not limited to, Confidentiality, Personally Identifiable Information, Return of Documents, Right to Audit/Record Retention, Non-Discrimination, Compliance with All Laws, and Compliance with Premises Rules, Practices and Policies.

19. Indemnification.

- a. Each party (the "Indemnifying Party") will indemnify, defend and hold harmless the other party and its affiliates, officers, directors, employees and agents (the "Indemnified Parties") from and against any and all liability to third parties (including, without limit, all related damage, third party claims, demands, costs, judgments, fees, reasonable attorney's fees or loss), relating to or arising out of any third party claims resulting from (a) any breach or alleged breach of any representation or warranty contained in this Contract, (b) any breach or alleged breach of any covenant or other obligation or duty of the Indemnifying Party under this Contract or under applicable law, (c) any infringement of intellectual property, or (d) the gross negligence or willful misconduct of the Indemnifying Party, its

affiliates, officers, directors, employees, and agents.

- b. The Indemnified Party (i) must make good faith efforts to provide timely written notice to the Indemnifying Party of any claim for which indemnification is sought, (ii) permits the Indemnifying Party to fully control the defense of any such claim, provided, however, the selection of counsel requires the Indemnified Party's written consent, such consent not to be unreasonably withheld; (iii) permits the Indemnifying Party to negotiate a settlement, provided, however, to the extent any settlement does not release the Indemnified Party from any and all liability, or admits liability, guilt or fault on the part of the Indemnified Party requires the Indemnified Party's written consent, such consent not to be unreasonably withheld, and (iv) provide reasonable assistance, at the Indemnifying Party's expense, in the defense of such claim as requested.
- c. The obligations of this Section shall survive the completion, expiration, cancellation or termination of this Contract.

20. Limitation of Liability.

- a. Limitation on Liability by Type. Neither party will be liable to the other party for any indirect damages (including incidental, special or consequential) or punitive damages unless said liability arises from (i) the Confidentiality provisions set forth in this Contract; (ii) the Personally Identifiable Information provisions set forth in this Contract; (c) the Indemnification provisions set forth in this Contract; or (d) a party's gross negligence or willful misconduct.
 - b. Limitation on Liability Amount. Except for liability arising from (i) the Confidentiality provisions set forth in this Contract; (ii) the Personally Identifiable Information provisions set forth in this Contract; (iii) the Indemnification provisions set forth in this Contract or (iv) a party's gross negligence or willful misconduct, the aggregate liability of any Party arising in connection with this Contract, however caused, and on any theory of liability, including without limitation contract, strict liability, negligence and/or other tort, shall in no event exceed the Contract Amount.
21. Nonwaiver. The failure of either party in any instance to insist upon a strict performance of the terms of this Contract or to exercise any option hereunder must not be construed as a waiver or relinquishment for the future performance of such term or option.
22. Relationship of the Parties. Contractor is not an employee, partner, agent of or joint venturer with Enterprise for any purpose. Contractor is and will remain an independent contractor in its relationship to Enterprise pursuant to this Contract.
23. No Third-Party Beneficiaries. Nothing in this Contract, expressed or implied, is intended to confer upon any person other than the parties hereto or their respective successors, any rights, remedies, obligations or liabilities under or by reason of this Contract.
24. Amendment. Any Amendment to the provisions of this Contract must be in writing and executed by both parties. In the event an administrative change or correction that does not affect the rights and obligations of Contractor is needed by Enterprise or Contractor (e.g., change in contact information, address or other corrections) (an "Administrative Change"), Enterprise or Contractor, as applicable, will provide notice in writing (email sufficient) to the other party of such Administrative Change.

25. Delegation; Assignment. Contractor shall not delegate any duties or assign any rights under this Contract without the prior written approval of Enterprise, such approval not to be unreasonably withheld or delayed. In the event Contractor desires an assignment of this Contract, Contractor must send a written request to Enterprise and provide background information to support the request. If the assignment is approved, Contractor shall submit to Enterprise all information and documents required by Enterprise, including full legal name of assignee, updated W-9 and ACH/payment information for assignee, any internal assignment documents, or other applicable items. Upon assignment approval and receipt of all required documentation, this Contract will be deemed assigned. No payments will be made to an assignee without the approval and documentation process being completed.
26. Severability. If any provision of this Contract or application thereof to any person or circumstances is held invalid, such invalidity will not affect other provisions of this Contract that can be given effect without the invalid provision, and to this end the other provisions are deemed to be severable.
27. Parties Bound. The terms and provisions of this Contract are binding upon the parties hereto, their legal representatives, successors and assigns.
28. Notice. Any notice which either party desires to provide the other party under this Contract must be sufficiently given, in writing and delivered to the party's address in this Contract or such other address as a party may specify in writing by (a) hand-delivery, (b) electronic mail, return receipt requested, (c) overnight courier, or (d) certified or registered first class mail, return receipt requested and postage prepaid. The notice shall be deemed to have been received: (a) if hand delivery, on the date of delivery if delivered during business hours on a business day (otherwise on the next business day), (b) if by electronic mail, on the date of delivery as stated on the return receipt; (c) if by overnight courier, the next business day; (d) if by mail, three (3) business days after mailing.
29. Entire Contract. No statement, promises or inducements made by any party hereto, or agent of either party hereto, which is not contained in this Contract, will be valid or binding; and this Contract may not be enlarged, modified or altered except in writing and signed by the parties, except for Administrative Changes.
30. Governing Law; Venue. This Contract must be construed and enforced in accordance with, and the rights of the parties shall be governed by, the laws of the State of Maryland exclusive of its conflicts of law rules. Contractor agrees that any litigation must be brought and prosecuted in any District or Circuit Court of Maryland, as appropriate, or Federal District Court, with venue in the United States Court for the District of Maryland, Baltimore Division and Contractor consents to the *in personam* jurisdiction of such courts. Contractor irrevocably waives any objection to, and any right of immunity from, the jurisdiction of such courts or the execution of judgments resulting therefrom, on the grounds of venue or the convenience of the forum.
31. Waiver of Jury Trial. CONTRACTOR HEREBY EXPRESSLY WAIVES ANY RIGHT TO TRIAL BY JURY OF ANY CLAIM, DEMAND, ACTION OR CAUSE OF ACTION AS MAY BE SET FORTH IN THIS CONTRACT.
32. Counterparts. This Contract may be executed in one or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.
33. Electronic Signature. The use of an electronic signature ("E-Signature") by any party in executing this Contract shall constitute the legal equivalent of a manual or handwritten signature as if the party signed this Contract in writing. No certification authority or other third-party verification shall be

required to validate the party's E-Signature, and the lack of such certification or third-party verification will not in any way affect the enforceability of the E-Signature/s or this Contract.

Attachment 2: Contractor Insurance Requirements

ATTACHMENT 2 - STANDARD INSURANCE REQUIREMENTS

If Contractor is not certain about the insurance requirements, Enterprise suggests that Contractor provide this information directly to Contractor's insurance provider to ensure exact coverage.

REQUIREMENTS FOR ALL INSURANCE:

- Carrier must be rated "A-" or higher in the AM Best Guide with a Financial Size Category of at least VI
- Named Insured must be Contractor's full legal name
- Policy must be current, not expired, and include all endorsements
- ACORD 25 or other similar certificate must be signed by an authorized representative of the insurance carrier
- **Certificate Holder and Additional Insured (as required below) must appear as:**

**ENTERPRISE COMMUNITY PARTNERS
INC. ("Enterprise")
11000 Broken Land Parkway, Suite 700
Columbia, MD 21044**

REQUIRED FOR ALL CONTRACTS
Certificate of Insurance (ACORD 25) evidencing Contractor's <u>Commercial General Liability Insurance</u> <ul style="list-style-type: none">• in amounts not less than \$1,000,000 per occurrence and \$2,000,000 in the annual aggregate• naming Enterprise as an <u>Additional Insured</u> as listed above
Certificate of Insurance (ACORD 25 or other state issued certificate) evidencing Contractor's <u>Worker's Compensation Insurance</u> <ul style="list-style-type: none">• a minimum of \$500,000 Employers' Liability Limit or consistent with state statute OR <ul style="list-style-type: none">• Sole Proprietors may provide their state authorized exemption form

Certificates evidencing such insurance must also be submitted to Enterprise as policies renew during the term of this Contract. Upon completion or termination of the Contract, Contractor should notify its insurance provider that it may cease sending evidence of such insurance to Enterprise.

**SUPPLEMENTAL INSURANCE(S) TO ADD
BASED ON CONTRACTOR'S SCOPE OF WORK / SERVICES /ACCESS TO FACILITIES,
STAFF, OR SYSTEMS**

Professional Liability

WHEN REQUIRED: Required for all contractors operating under a professional license (Examples may include attorneys, engineers, architects, environmental consultants, insurance or other counselors and consultants, accountants, real estate agents, health/medical advisors) and all contractors engaged in public or private presentations, workshops, or trainings or provide technical assistance or produce content that Enterprise publishes to the public.

Certificate of Insurance (ACORD 25) evidencing Contractor's **Professional**

Liability (also known as Errors and Omissions coverage)

- in an amount not less than \$1,000,000 per claim and \$1,000,000 in annual aggregate

Auto Insurance

WHEN REQUIRED: If auto is used in performance of services, one or more of the following policies will be applicable

Certificate of Insurance (ACORD 25) evidencing Contractor's **Auto Insurance**

- Commercial Auto Insurance in amounts not less than \$1,000,000 for combined liability/physical damage for all owned, non-owned and hired automobiles;
OR
- If no owned autos, Commercial General Liability may be substituted by coverage extended from the Commercial General Liability Hired/Non-Owned Auto in amounts not less than \$1,000,000 Combined Single Limit
OR
- **SOLE PROPRIETORS ONLY:** Personal Auto Insurance in amounts of not less than \$100,000 per person and \$300,000 per accident Bodily Injury Liability and \$100,000 per accident in Property Damage Liability
- naming Enterprise as an **Additional Insured** as listed above

Cyber Insurance

WHEN REQUIRED: Required for contractors who have access to Enterprise's Information Technology systems or hardware, where they have access to Confidential or Restricted data defined by the Data Classification Policy or they have access to or collect Personally Identifiable Information (PII) as defined by the PII Policy.

Certificate of Insurance (ACORD 25) evidencing Contractor's **Cyber Insurance**

- in amounts not less than \$1,000,000 per claim with third party coverage
- naming Enterprise as an **Additional Insured** as listed above

Sexual Abuse and Molestation

WHEN REQUIRED: Required when contractors (or their employees) will come into contact with vulnerable individuals or minor children as part of the services provided under the contract.

Certificate of Insurance (ACORD 25) evidencing Contractor's **Sexual Abuse and Molestation**

- in amounts not less than \$1,000,000 per claim
- naming Enterprise as an **Additional Insured** as listed above

Crime

WHEN REQUIRED: Required where a contractor (or their employees) have access to Enterprise facilities that contain property that could be stolen.

Certificate of Insurance (ACORD 25) evidencing Contractor's **Crime**

- in amounts not less than \$500,000 per claim with third party coverage
- naming Enterprise as an **Additional Insured** as listed above

Appendix A. Further Audience Definition

In addition to our priority audiences (noted in Figure 1), we have grouped many diverse constituencies from across the organization in larger affinity groups based on their primary orientation to Enterprise, with room for some audiences to span multiple categories. For example, we may target advocates, a group that could range from those who are already primed for action as supporters to those with no previous exposure to affordable housing but who may be interested in supporting our work due to anti-poverty commitments.

CURRENT STATE

Our Audiences

Enterprise has a multitude of audiences ranging from investors to community partners, policymakers, residents, and many more. *Targeting each stakeholder group from one perspective limits our ability to reach, engage, and activate these audience, as well as to make the most of their potential.* Investors are both experts and supporters, as media and policymakers are both experts and amplifiers.

To reach scale and continue to serve a diverse constituency, we've grouped our current and prospective audiences into four functional categories – this will allow us in a future state to design campaigns and digital engagement efforts that serve objectives across the organization.

Experts	Uninitiated + Amplifiers	Supporters	Insiders & Champions
Experts, researchers, decision-makers and actors who can serve as Enterprise partners to fulfill the mission	People uninitiated in but with a personal stake or professional interest in learning more and either engaging with or amplifying Enterprise's work	Individuals and groups with a specific motivation to engage in funding Enterprise's work	Closely affiliated (current, former, and future) who are intimately associated with Enterprise's work and can serve as champions and spokespeople
<ul style="list-style-type: none"> *Community Partners *Investors *Developers Grantees Trainees Researchers/Academics CPAs/Sponsors/Auditors 	<ul style="list-style-type: none"> *Current Residents *Prospective Residents Interested Public 	<ul style="list-style-type: none"> *High Net Worth Individuals *Investors *Corporations *Foundations Retail Donors 	<ul style="list-style-type: none"> *Prospective Employees Board Members
	<ul style="list-style-type: none"> *Media *Government Partners Housing Providers & O/Os 	<ul style="list-style-type: none"> Volunteers Advocates 	<ul style="list-style-type: none"> *Current Employees

*Audiences identified in Brand & Storytelling Guidelines
New, emergent or desired audiences

“O/O’s” in this diagram refers to owner-operators, particularly of multi-family affordable housing.