REQUEST FOR PROPOSALS

Digital Marketing & Integrated Growth Services

cdcb come dream. come build.

Issued: June 19, 2026
Proposals Due: July 27, 2026 (Noon Central)

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Questions: info@tacdc.org

SECTION 1: INTRODUCTION & ORGANIZATIONAL OVERVIEW

1.1 Purpose of This RFP

cdcb | come dream. come build (hereinafter “cdcb” or "the Organization") is issuing this Request for Proposals (RFP) to identify and engage a full-service digital marketing firm to serve as a strategic and executional growth partner. We are not seeking a traditional agency vendor relationship. We are seeking a firm capable of functioning as an embedded partner — one that understands our mission, programs, and audiences, and that can operate with the professionalism, agility, and accountability of an internal marketing team.

1.2 Organizational Background

cdcb Is a private, 501(c) (3) non-profit community housing development organization (CHDO). Founded in 1974, cdcb has been providing safe, sanitary affordable housing to the citizens of South Texas, and is now one of the largest non-profit producers of single-family housing for homeownership in Texas.

cdcb creates housing opportunities for low-income families in the southernmost tip of Texas through below-market financing, quality construction, and efficient home designs. cdcb has earned national recognition for its work in the Colonias along the border with Mexico and for its innovative bank consortiums for homeownership lending and production.

1.3 Current Marketing Situation

The Organization currently operates with limited internal digital marketing capacity while relying on a mix of internal staff and traditional marketing approaches. Key challenges we seek to address include:

- Inconsistent brand presence across digital channels
- Limited visibility into channel-level performance and return on marketing spend
- Insufficient integration between marketing activities and CRM/intake systems
- Need for bilingual content and outreach capability
- Gap between marketing activity and measurable applicant/enrollment outcomes
- Insufficient alignment between digital media and community outreach

1.4 Strategic Objectives

Through this engagement, we aim to:

- Increase qualified applicant volume across all programs
- Reduce cost per applicant and improve lead-to-application conversion rates
- Build a durable, **owned** digital infrastructure (data, accounts, assets)
- Develop a clear, consistent, and compelling brand voice across all channels
- Establish reporting systems that connect marketing investment to program outcomes

SECTION 2: SCOPE OF WORK

The selected firm will serve as a full-service digital marketing partner. The scope is organized into six functional areas. Vendors must clearly indicate their capacity in each area and whether services would be delivered in-house, through vetted subcontractors, or via a hybrid approach.

2.1 Content Production & Management

The firm will be responsible for developing and maintaining content that communicates our programs clearly, compellingly, and consistently across all touchpoints.

Deliverables include:

- Website content: program pages, landing pages, evergreen content updates
- Social media content: multi-platform (Meta, LinkedIn, TikTok, YouTube as applicable), including bilingual content (English/Spanish at minimum)
- Video and visual content: short-form social video, explainer videos, campaign creative assets, photography direction
- Blog, educational, and storytelling content: client success stories including successful homeownership stories.
- Email and SMS content templates (for automation workflows)

2.2 Digital Channel Execution

Day-to-day management and optimization of all digital marketing channels:

- Website management: CMS updates, page creation, performance monitoring, UX improvements
- SEO strategy and implementation: technical SEO, content SEO, local SEO (multi-location if applicable), bilingual search optimization
- Paid media: Meta Ads (Facebook/Instagram), Google Ads (Search, Display, YouTube), Online TV ads, programmatic display; includes strategy, creative, targeting, and bid management
- Social media scheduling, posting, community engagement, and moderation support
- Email marketing execution

2.3 Lead Generation & Conversion

The firm will take direct ownership of the full digital funnel, from awareness through application submission:

- Landing page development and A/B testing
- Form and application conversion optimization
- Funnel architecture: awareness → interest → consideration → application → enrollment
- Retargeting strategy across paid channels
- Lead scoring recommendations in coordination with internal intake teams

2.4 Marketing Infrastructure & Integration

The firm must demonstrate strong technical capacity to integrate with our existing systems and build durable infrastructure:

- CRM/intake system integration — lead data must flow seamlessly from digital channels into intake workflows
- Lead capture and UTM tracking across all paid and organic channels
- Pixel setup, tag management (Google Tag Manager), and conversion event tracking
- Email/SMS automation workflow design and implementation
- Data ownership protocols: all accounts, tracking data, and creative assets remain property of the Organization

2.5 Strategy & Advisory

We expect our partner to bring genuine strategic thinking — not just execution. The firm will:

- Develop and maintain an ongoing marketing strategy roadmap
- Lead quarterly campaign planning across programs and geographies
- Provide messaging clarity and brand positioning guidance
- Recommend channel mix adjustments based on performance data
- Advise on audience segmentation, market positioning, and competitive differentiation
- Participate in internal planning meetings as a strategic voice (not just a reporting function)

2.6 Reporting & Performance Management

Monthly and quarterly reporting must be outcome-oriented and actionable:

- Monthly performance dashboard tied to agreed KPIs
- Core KPIs include: Cost per applicant (CPA), Lead-to-application conversion rate, Channel-level ROAS and attribution, Website traffic and engagement trends, Social media reach, engagement, and follower growth
- Monthly then quarterly strategy review sessions with senior leadership
- Proactive recommendations — not just data delivery
- Reporting must be accessible to non-technical stakeholders (board-level summaries available upon request)

2.7 Additional Capabilities (Consultant-Identified Gaps)

In addition to the services listed above, please describe your capacity in the following areas:

- Event marketing support: virtual and in-person information sessions, open houses, community outreach events
- Reputation and review management: Google Business Profile optimization, monitoring and responding to reviews
- Accessibility and compliance: WCAG 2.1 AA compliance for digital properties, CAN-SPAM/TCPA compliance for email/SMS

- AI-assisted content production: does the firm use AI tools, and if so, how are quality and accuracy safeguarded?
- Community and influencer partnerships: micro-influencer programs, alumni ambassador content, community organization co-marketing

SECTION 3: VENDOR REQUIREMENTS

Vendors must meet the following minimum qualifications to be considered for evaluation. Proposals that do not address each requirement will be disqualified.

3.1 Minimum Qualifications

1. Demonstrated Experience: Minimum of 3 years operating as a full-service digital marketing firm with verifiable client references.
2. Relevant Sector Experience: Experience working with mission-driven organizations (nonprofit, social services, advocacy, workforce development, healthcare, or education sectors strongly preferred).
3. Full-Service In-House Capacity: Core services — including content, paid media, SEO, and reporting — must be delivered primarily in-house. Any subcontracting must be disclosed.
4. Bilingual Capability: Demonstrated capacity to produce content in English and Spanish, including native-language speakers or qualified translators on staff or under contract.
5. Technical Integration Experience: Prior experience integrating marketing platforms with CRM systems (e.g., Salesforce, HubSpot, or equivalent) and configuring tracking/analytics infrastructure.
6. Financial Stability: Firm must be in good financial standing and able to provide proof of business registration and appropriate insurance.

3.2 Staffing & Team Structure

Proposals must include:

- A proposed account team structure with named key personnel and their roles
- Bios or CVs for the proposed Account Lead, Strategist, and any specialist leads (paid media, SEO, content)
- Commitment that key personnel will not be changed without prior written notice and Organization approval
- Description of escalation paths and backup coverage protocols

3.3 References

Vendors must provide a minimum of three (3) client references, including:

- Client organization name and primary contact
- Scope of services provided
- Approximate monthly retainer or annual spend
- Duration of engagement
- Measurable outcomes achieved

At least one reference must be from an organization with a comparable mission or population served. The Organization reserves the right to contact references not listed by the vendor.

3.4 Conflict of Interest Disclosure

Vendors must disclose any current or recent (within 24 months) relationships with organizations that may be in competition with cdcb for program participants, or programmatic funding. The Organization will review disclosures on a case-by-case basis.

SECTION 4: SUBMISSION REQUIREMENTS

4.1 Proposal Structure

Proposals must be submitted as a single PDF document, not to exceed 35 pages (excluding appendices), and must follow the structure below. Proposals that omit required sections will be penalized in scoring.

7. Cover Letter (1 page): Firm name, address, primary contact, date, and a brief statement of why the firm is uniquely positioned for this engagement.
8. Executive Summary (1–2 pages): Concise overview of proposed approach and differentiators.
9. Firm Overview (2–3 pages): History, size, structure, ownership, and description of in-house capabilities vs. subcontracted services.
10. Relevant Experience & Case Studies (3–5 pages): Minimum 2 detailed case studies demonstrating measurable outcomes. Must include KPIs, before/after comparisons, and client-verifiable results.
11. Proposed Account Team (1–2 pages): Team org chart, bios, and role descriptions for all individuals who would work on this account.
12. Strategic Approach (4–6 pages): How you would approach our situation in the first 90 days, 6 months, and Year 1. Include a sample campaign framework or strategic recommendation based on publicly available information about our organization.
13. Technical Capabilities (2–3 pages): CRM integration experience, analytics and tracking infrastructure, data ownership protocols, platform access management.
14. Pricing Proposal (2–3 pages): See Section 5 for required format.
15. Governance & Ownership (1–2 pages): See Section 7 for required elements.
16. References: Minimum 3 references as specified in Section 3.3.
17. Appendices (as needed): Sample reports, creative portfolios, platform certifications, etc.

4.2 Submission Deadline & Process

RFP Issued	6-26-2026
Proposals Due	7-27-2026 by Noon Central
Award Notification	8-3-2026
Anticipated Start Date	8-6-2026

4.3 Submission Instructions

- Proposals must be submitted electronically to: info@tacdc.org
- Subject line: "Digital Marketing RFP — [Firm Name]"
- File format: Single PDF, named: cdcb_RFP_FirmName_Date.pdf
- Late submissions will not be accepted

SECTION 5: PRICING STRUCTURE

We require complete pricing transparency. Ambiguous, bundled, or incomplete pricing proposals will be evaluated unfavorably. Vendors must complete all components of the pricing section.

5.1 Required Pricing Format

Proposals must include an itemized pricing table covering all services in the proposed scope. At minimum, the following must be clearly priced:

Service Category	Monthly Retainer	Notes / Variables
Strategy & Account Management	$_____	*Includes # hours/month*
Content Production (Web, Blog, Social, Flyers)	$_____	*# assets/month*
Paid Media Management Fee	$_____	*% of spend or flat*
SEO Services	$_____	
Reporting & Analytics	$_____	
Website Management	$_____	
Additional Services (itemize)	$_____	
TOTAL MONTHLY RETAINER	$_____	*Excl. ad spend*

5.2 Paid Media / Ad Spend

Paid media ad spend (Meta Ads, Google Ads, etc.) is separate from the management retainer and will be billed directly to the Organization. Vendors must disclose:

- Recommended monthly ad spend range for Year 1, by platform
- Whether any revenue share, markup, or media rebate applies to ad spend placed on our behalf — this must be disclosed fully
- Minimum spend thresholds, if any

5.3 Contract Terms

- Preferred initial contract term: 1-3 months with option to renew
- Specify any required minimum contract lengths
- Describe your termination and offboarding process (see also Section 7)
- Identify any setup, onboarding, or one-time fees

SECTION 6: EVALUATION CRITERIA & SCORING RUBRIC

All proposals will be evaluated by a review committee using the following weighted scoring framework. Scores are assigned on a 0–10 scale per category. Total weighted scores will be used to produce an initial shortlist for finalist presentations.

6.1 Scoring Framework

Evaluation Category	Weight	Scoring Criteria (0–10)
Demonstrated Results & Case Studies	25%	Specificity of outcomes (CPA, conversion rates, enrollment growth). Verifiability. Comparability to our context.
Strategic Thinking & Advisory Capacity	20%	Quality of proposed 90-day and Year 1 strategy. Evidence of proactive recommendations vs. order-taking. Senior team involvement.
Team Quality & Composition	15%	Relevant experience of named personnel. Sector knowledge. Staff retention indicators. Coverage and escalation protocols.
Technical Integration Capability	15%	CRM integration experience. Analytics infrastructure. Data ownership clarity. Platform expertise.
Pricing Transparency & Value	10%	Completeness and clarity of pricing. Reasonableness relative to scope. Disclosure of any media markups or rebates.
Bilingual & Cultural Competency	10%	Native or professional-level multilingual content capacity. Demonstrated audience-specific experience.
Governance & Ownership Protocols	5%	Clarity on data, asset, and account ownership. Transition/exit process. Platform access controls.

6.2 Scoring Scale

Score	Rating	Description
9–10	**Exceptional**	Exceeds requirements; highly specific, verifiable evidence; compelling differentiation
7–8	**Strong**	Meets all requirements; solid evidence; minor gaps or questions
5–6	**Adequate**	Meets most requirements; some gaps; additional clarification needed
3–4	**Weak**	Significant gaps; limited evidence; concerns about capacity
0–2	**Deficient**	Does not meet requirements; missing or unverifiable claims

SECTION 7: GOVERNANCE, DATA OWNERSHIP & EXIT CONDITIONS

cdcb places significant weight on ownership, transparency, and transition readiness. These terms are non-negotiable and must be addressed in all proposals.

7.1 Data Ownership

- All marketing data collected through campaigns, website analytics, and lead capture forms is the exclusive property of cdcb
- Vendors must never use our data for their own marketing, benchmarking, or case study purposes without explicit written consent
- Lead and contact data may not be retained by the vendor after contract termination
- All audience lists, retargeting pools, and CRM data remain with cdcb

7.2 Account & Platform Access

The Organization requires primary ownership and administrative access to all digital platforms used on our behalf:

- Ad accounts (Meta Business Manager, Google Ads): Organization holds primary admin access; vendor is granted manager-level access
- Analytics (Google Analytics, Looker Studio, etc.): Organization retains admin access
- CMS: Organization retains admin access; vendor is granted editor-level access as needed
- Social media accounts: cdcb retains primary account ownership
- Tag management (Google Tag Manager): cdcb retains container ownership
- Backend access to websites for any emergency updates as well as any other host sites

No accounts, pixels, or tracking assets may be created under the vendor's primary ownership. All accounts created on behalf of the Organization must be transferred to Organization ownership within 30 days of engagement start.

7.3 Creative Asset Ownership

- All creative assets produced for the Organization — including copy, design, video, photography, templates, and brand materials — are work-for-hire and are the exclusive property of the Organization upon payment
- Vendors must deliver all source files (editable formats: .ai, .indd, eps, mp4, etc.) upon request or at contract conclusion
- Stock imagery, licensed music, or third-party assets incorporated into deliverables must be fully licensed for unrestricted organizational use

7.4 Transition & Exit Conditions

To protect continuity, vendors must describe their offboarding process, including:

- Minimum notice period for contract termination (vendor-initiated and client-initiated)
- Timeline for full knowledge transfer, including: documentation of all active campaigns, account structures, and passwords; handover of all creative files, content calendars, and strategic documents; live walkthrough of analytics setup and reporting infrastructure
- Commitment to maintain active campaigns during transition at no additional charge for a minimum of [30–60] days following notice of termination
- Any cancellation fees or contract penalties must be clearly disclosed in the pricing proposal

SECTION 8: IDEAL VENDOR PROFILE

The following profile describes the characteristics of the ideal partner. This is provided to help vendors self-assess fit and to guide our evaluation committee. We expect a range of firms to apply — this profile reflects our aspirational match, not a disqualifying checklist.

8.1 Firm Characteristics

- Boutique to mid-size agency (5–50 staff), where our account will receive meaningful senior attention — not be handed to junior staff
- Mission-aligned: experience working with and genuine commitment to social-impact organizations
- Integrated team structure: strategy, creative, paid media, SEO, and analytics under one roof
- Data-first culture: decisions are driven by performance data, not intuition or convention
- Transparent pricing: no hidden media markups, percentage-of-spend surprises, or opaque retainer structures

8.2 Differentiating Capabilities We Will Prioritize

- **Demonstrable experience driving applicant or enrollment growth** — not just impressions or engagement metrics
- CRM integration fluency: the ability to connect top-of-funnel marketing to downstream enrollment outcomes
- Bilingual execution capacity (not outsourced — in-house or deeply embedded)
- Proactive strategic counsel: bringing ideas and recommendations, not waiting to be directed
- Comfort working within a nonprofit or public-benefit organization context, including grant reporting awareness and reputational sensitivity

8.3 Red Flags We Will Screen For

- Inability to name specific measurable outcomes from comparable engagements
- Vague or bundled pricing that obscures the cost of individual services
- Account teams led by business development staff, not the actual practitioners
- Media markups or rebates that are not proactively disclosed
- Lack of data ownership clarity or vendor-held accounts
- High client turnover or reluctance to provide direct references

SECTION 9: TERMS, CONDITIONS & PROCUREMENT NOTES

9.1 Reservation of Rights

- cdcb reserves the right to reject any or all proposals, to waive informalities, and to accept the proposal deemed most advantageous to the Organization.
- This RFP does not constitute a contract or commitment to purchase services.
- The Organization is not responsible for any costs incurred by vendors in preparing or submitting proposals.

9.2 Confidentiality

- All proposals are treated as confidential to the extent permitted by applicable law.
- Vendors may not publicize their participation in this RFP process without prior written consent.

9.3 Equal Opportunity

cdcb is an equal opportunity employer and contractor. We encourage proposals from firms owned by women, minorities, veterans, and persons with disabilities.

9.4 Questions & Clarifications

All questions regarding this RFP must be submitted in writing to Matt Hull at info@tacdc.org.