

REQUEST FOR PROPOSALS

ARC's Aging & Independence Services' Request for Targeted Outreach to Support Empowerline

INTRODUCTION

The Atlanta Regional Commission (ARC) is seeking proposals from firms that work in the field of communications, branding, marketing, media planning and buying, and plan implementation. The firm will assist ARC in redesigning the website to create a more optimal user experience and crafting messaging for Empowerline, a service in the 10-county Atlanta region that connects adults over age 60 and people with disabilities with resources to help them live more independently.

The scope of service for the work includes assessing the current state of the Empowerline website; creating clear and compelling messages to better communicate the resources Empowerline offers and enhance program visibility; redesigning the website so it's easier to navigate; and developing and executing outreach strategies.

Deliverables include Website Assessment, Website Messaging, Website Redesign Strategies, Outreach Strategies, and Evidence-Based Outreach Strategies – Proposed Funding up to \$150,000.

The target audience includes adults ages 60 and over, adults with disabilities, and care partners with a focus on people of these groups residing in communities identified by ARC as being under-enrolled in Empowerline services.

ARC intends to award a contract for work to be started in the second quarter of SFY 2024. It is anticipated that funds for the project will not exceed \$150,000. This contract could be renewable for up to 2 years to continue executing website redesign and outreach strategies created during this process. This contract includes upfront work that is needed to support future years' external outreach campaigns; any execution of the contract renewal option could include a shift in how the work and funds are allocated among the tasks.

APPLICANT ELIGIBILITY

Individuals and organizations, whether for-profit or not-for-profit, having the appropriate experience and specific expertise necessary to carry out the duties and responsibilities outlined herein are eligible. All who submit a proposal must have demonstrated similar project experience to be eligible for consideration and must also have a clear and demonstrated understanding of the core work of the ARC and its Aging & Independence Services Group. ARC reserves the right to check all references furnished and consider the responses received in evaluating the proposals.

At a minimum, but not limited to, the selected firm will be required to adhere to the following:

- General Financial Requirements & Assurances
- Assurance of Compliance with Title VI of the Civil Rights Act of 1964
- Assurance of Compliance with Section 504 of the Rehabilitation Act of 1973, as Amended, and the Americans with Disabilities Act of 1990
- Disclosure of Lobbying Activities Form
- Certifications Regarding Debarment, Suspension and Other Responsibility Matters; Drug-Free Workplace Requirements; and Lobbying

CONFIDENTIALITY AND CONFLICT OF INTEREST

ARC is subject to the Georgia Open Records law. All proposals submitted will become public records to be provided upon request. Any information containing trade secrets or proprietary information, as defined by state law, must be marked as confidential to prevent disclosure. Confidential markings must be limited to the protected information. Entire proposals marked confidential will not be honored. Additionally, conflicts of interest are governed by the ARC Standards of Ethical Conduct available here: [Standards of Ethical Conduct](#). Respondents must disclose any potential conflicts of interest that may arise from the provision of services described herein. Such disclosure should include the name of the individual(s) with whom there is a conflict, any relevant facts to the potential conflict, and a description of the internal controls proposed to mitigate any such conflict. ARC's Staff Legal Counsel will determine whether such disclosure presents a potential organizational conflict of interest that should preclude award to the respondent.

PROPOSAL FORMAT AND CONTENT

Interested firms should submit a proposal that addresses the factors listed below and build upon recent successful targeted outreach activities and recent work to clarify what Empowerline does, to better understand its audiences, and to communicate with these audiences. (*Please see the attached document that resulted from this work in 2022.*) The Proposer must provide a detailed breakdown of the proposed budget in the format of Exhibit B.

Firms must respond to this RFP with a proposal sent **electronically** in either a PDF file or Microsoft Word compatible word processing format.

ARC anticipates that a contract will be awarded by the January 1, 2024 (Calendar Year) third quarter of SFY 2024. All work must be completed, and all funding invoiced by December 31, 2024. The successful firm or team of firms should be prepared to begin work immediately. ARC reserves the right to award all or part of the available funds for this project.

Proposals must include the following information:

1. Legal name of the firm.
2. Point of contact (name, title, phone number, mailing address, and email address) at lead firm.
3. Qualifications and technical competence of the firm(s) in the type of work required.
4. Description of experience on similar projects including a list of at least 3 references within the past 5 years, with current contact information.
5. Listing of key project personnel and their qualifications.
6. Geographic location of the firm's office performing the work.
7. A detailed description of the technical approach proposed for accomplishment of the work.
8. A proposed schedule and work plan for the accomplishment of the work described in this RFP.
9. A proposed project budget in the format at Exhibit B to this RFP.
10. Any other pertinent information.

PROPOSAL EVALUATION

The review of written proposals will be based on the following evaluation criteria, with the relative weights in parentheses:

1. Related experience, qualifications, and references of the firm(s) and project staff (35%)
2. Technical approach, including research, interviews, data mining, etc. (25%)
3. Work plan and schedule (30%)
 - a. Note: This includes the firm's ability to demonstrate a balanced workload for its staff to carry out its responsibilities to ARC in balance with any other contracts the consultant may have.
4. Proposed budget (10%)

The selected Contractor must have a proven track record of outreach demonstrated within the proposal that includes:

- Creative work
- Planning and administration, including budget tracking and timelines
- Demonstrated Return on Investment (ROI)
- Working within defined budgets

In addition to technical and industry skills, the Contractor should possess:

- Keen organizational ability
- Creative ability
- Technical interest
- Financial acumen
- Strong writing and presentation abilities

- Computer skills: Familiarity with the most used components of the Microsoft Office suite of software (Word, Access, Excel, and Power Point), project management software, and Eventbrite advanced functions
- An ethical and moral grounding
- Understanding of, and commitment to, metro Atlanta

PROPOSAL SUBMITTAL

Questions should be submitted via email to Paul Donsky no later than 3:00 p.m. Thursday, November 16, 2023, to pdonsky@atlantaregional.org. All questions received, and responses to those questions will be sent by email by 4:00 p.m. on Monday, November 20, 2023.

ARC must receive (1) copy in digital format (sent to apascual@atlantaregional.org), either in Microsoft Word or PDF format, no later than **4:00 p.m. ET on Monday, Dec. 4, 2023**.

- RFP release date: November 2, 2023
- Deadline for questions: November 16, 2023
- Proposals due: December 4, 2023
- Contract award: January 2, 2024

Proposals shall not exceed a total of 15 pages (8.5 x 11) printed double-sided, inclusive of resumes and firm experience. Covers, end sheets, budget exhibits, and an introductory letter shall not count against this maximum. Font size shall be a minimum of 11 point in all cases.

If interviews are necessary, a short list of firms will be invited to participate in an interview process with an evaluation committee to be scheduled in October. ARC will confirm a specific interview date and time with those selected firms. ARC reserves the right to award this contract based on initial proposals received without formal interviews and to award all or part of this project to one or more firms.

ARC reserves the right to select for contract or for negotiations a proposal other than that with the lowest cost, to reject any and all proposals or portions of proposals received in response to this RFP or to make no award, to waive or modify any information, irregularity, or inconsistency in proposals received, to request modification to proposals from any or all proposers during the contract review and negotiation, and to negotiate any aspect of the proposal with any proposer and negotiate with more than one proposer at the same time.

Exhibit A: Scope of Work

I. General

The work to be accomplished by the Contractor(s) is in support of the following ARC work program component: ARC's Aging & Independence Services Group, which serves as the federally designated "Area Agency on Aging" for metro Atlanta.

II. Organizational Background

The Contractor shall perform all the necessary services provided under the scope of work within the Atlanta Region (10-county metro area). This planning region encompasses the City of Atlanta and 10 metro counties: Cherokee, Clayton, Cobb, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry, and Rockdale.

The Atlanta Regional Commission is the planning agency for the metro Atlanta region and serves as the fiscal and administrative agent for the Area Agency on Aging/Aging & Independence Services Group. As such, the Area Agency on Aging/Aging & Independence Services Group is charged with implementing the federal Older Americans Act across the region to provide a wide range of services and programs for adults ages 60 and over so they can live independent lives.

In implementing the OAA, Aging & Information Services provides trustworthy information and resources to adults over 60, adults with disabilities and their caregivers so they can connect with the services they need. These services include transportation, meal delivery, respite care, in-home care, behavioral health resources, and many other supports that will help these adults live independently in their homes. The goal is to improve the lives of metro Atlanta residents of all ages, income levels and abilities.

Metro Atlanta's population is aging fast. In 2019, 1 in 8 residents of the region were 60 and older. By 2050, this population will triple to 1.8 million, representing 1 in 4 residents.

Most residents want to stay in their homes and communities as they age, but lack of access to transportation, pedestrian-friendly neighborhoods, and affordable housing make it hard for many Atlantans to age at home. That's where the work of the Aging & Independence Services comes in, maximizing the independence, health and well-being of older adults, adults with disabilities, and their caregivers.

The critical outreach tool of Aging & Independence Services is Empowerline, "your resource for aging, disability, and caregiver needs in metro Atlanta." Empowerline is a free resource that connects our targeted audiences with the local services they need. It is a consumer-facing tool and has a self-search mechanism so clients can search what they're looking for in their community.

This project includes all aspects of assessing the current state of the Empowerline website; creating clear and compelling messages to better communicate the resources Empowerline offers and enhance program visibility; redesigning the website so it's easier to navigate; and developing and executing outreach strategies.

III. Project Background

Empowerline is the consumer-facing brand for a powerful tool that connects older adults, adults with disabilities, and their caregivers in the 10-county metro area with resources that are close and accessible to them.

Empowerline was created so that it's easy to navigate and understand, and so that clients can get in touch with a certified, trained information specialist via phone, online chat or email to find the services they need. The consultation with the Empowerline specialist is free, but cost of service depends on the service the clients need and their financial situation. Empowerline aims to be the go-to destination for all metro Atlanta residents ages 60 and older, adults with disabilities and their caregivers who are seeking info and resources to live more independent lives.

These resources are meant to make their lives easier, to be able to stay living at home, to live more independently. It is a brand that was refreshed about three years ago to make it easier for the intended audiences to connect with resources. Empowerline is federally funded through the Older Americans Act. It aims to eliminate barriers (i.e., lack of information, limited financial resources, language assistance) that keep the intended audiences from accessing services. In 2022, ARC worked with a creative firm to help us understand the target audiences as well as design media plans for the website. ARC determined that the next step would be to update/redesign the website in order to strengthen the messaging to our target audiences.

This assignment calls for building upon this recent work. Before fully activating the media plans, ARC will need to create key messages and create a website that offers an optimal user experience. Using strategies that are based on supporting research and analysis to justify the recommended approach, the Contractor will create messaging for various platforms and redesign the website so that it is engaging and has clear messaging.

More specifically, the new messaging and the redesigned website will:

- Position Empowerline as the "go-to," most comprehensive, most trusted source of information and resources across the metro area for older adults, adults with disabilities and their caregivers who wish to live more independent lives
- Increase engagement with Empowerline by calling, live chatting or emailing the information specialists
- Increase enrollment in the programs and services that Empowerline is connecting the clients to primary audiences:
 - Adults 60 and older, adults with disabilities, and their care partners in the 10-county metro area who have limited resources and face barriers to accessing services they need to live more independent lives.

Once a Contractor is selected, the workflow will be as follows:

Kick-off Meeting and Regular Progress Meetings

The Contractor and ARC staff will hold a kick-off meeting at ARC offices to introduce the teams involved, discuss the scope of work, confirm the process to complete the work within the required timeframe, and clarify the roles and expectations of all involved. Regular progress meetings will be held between the Contractor and ARC (in person or electronic).

Work Plan

Once we have the initial meeting, the Contractor will come up with a plan that highlights goals and deadlines.

Website Assessment

Includes reviewing the current website Empowerline.org to assess its current state and create a plan to improve user experience.

Messaging

Includes identifying and developing core messages and specific messages for digital and non-digital assets.

Website Redesign

Craft a new vision and layout for the website so as to maximize self-service, optimize user experience, and raise the visibility of Empowerline.

Evidence-Based Outreach Strategies (EBP)

We would like to work with vendor to review our current outreach materials for evidence-based programs and provide suggestions to:

- Ensure they see them as appropriate for the markets we are targeting

- Identify additional materials to be created – that would be helpful in reaching identified populations

Develop a marketing/outreach plan to ultimately reach more individual participants through our programs by recruiting

- Workshop participants (in both our in-person and, especially, our virtual programming)
- Volunteers to be trained to lead these workshops (a mix of those comfortable in leading in-person and virtually)
- New host locations (particularly in underserved areas of the region)
- Organizations and individual participant referral partners
- Potential payors (healthcare, senior living, insurance, physician groups, etc.)

Working with our partners at the Georgia Health Policy Center to evaluate the effectiveness of any outreach strategies we implement over the next coming years

Targeted participant and volunteer population demographics include

- POC
- Low-income/SES
- Living in medically underserved communities
- Limited English proficiency
- Individuals who are socially isolated
- Communities/counties in our region who have had few (if any) workshop offerings

Main pain point over the past three years has been recruiting virtual participants

- This is a new market and an exciting area of growth – to introduce more individuals to not only EBPs, but to the AAA as a resource
- What collateral would be most helpful to be developed to target new clients (outside our current network of individuals already being served by ARC/providers)
- If individuals are socially isolated, but do not have access to technology/internet, how can we find/identify them??? (if that is the barrier to their accessing our workshops, we can work to provide solutions)
- Where to advertise – what platforms, how often, and how could a team of, currently, two people stay consistent/keep up with whatever that looks like?

Website assessment and evaluation, work plan	20%
Identify key messages and develop variety of core messages for Empowerline for various media (website, digital ads, brochures, etc.)	20%
Website redesign	20%
Outreach spending	20%
Evidence-Based Outreach Strategies	20%
<p><i>Note: The estimates listed above are preliminary and actual costs by task may vary so long as the total contract value does not increase. Any change to the budget estimates shown above must be requested in writing and approved by ARC.</i></p>	

EXHIBIT B: Proposed Project Budget

Provide a budget in two formats as detailed below.

A: Labor Focused Budget

1. Direct Labor

Estimated Hours and Rate/Hour

Total Estimated Cost \$_____

(List by position all professional personnel participating in project, including rates)

Total Direct Labor \$_____

2. Overhead Cost

(OMB circulators A-87 and A-122) (Overhead percentage rate) X (Total Direct Labor)

Total Overhead \$_____

3. Other Direct Costs

(List other items and basis for computing cost for each. Examples include ad buys, collateral, printing, etc.)

Total Other Direct Costs \$_____

4. Subcontracts

(For each, list identity, purpose, and rate)

Total Subcontracts \$_____

5. Travel

a. Travel by common carrier from/to the ARC offices. *(List number of trips and Economy class airfare, plus taxi and shuttle fares, etc.)*

b. Travel by private automobile within ARC area. *(List # of days x rate)*

Total Travel \$_____

6. Profit

(Percentage rate X basis)

Total Profit \$_____

Total Estimated Cost and Profit \$_____