

## 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 developing effective and compelling messaging and a media/communications plan to support Empowerline, a service 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 evaluating and updating existing messaging as needed; developing a communications/media plan to reach target audiences and meet program goals; media planning; and search engine optimization for empowerline.org. The target audience includes adults aged 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 first quarter of 2022. It is anticipated that funds for the project will not exceed \$25,000. This contract could be renewable for up to 3 years to execute the plan.

### 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 and Assurances
- Required Certificates of Insurance
- 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

## **PROPOSAL FORMAT AND CONTENT**

Interested firms should submit a proposal that addresses the factors listed below and be based on the existing brand playbook (included with this RFP) and will build upon recent successful targeted outreach activities. 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 first quarter of 2022. All work must be completed and all funding invoiced by April 30, 2022. 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%)

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 Aixa Pascual no later than 4:00 pm on Wednesday, November 17, 2021 via email to [apascual@atlantaregional.org](mailto:apascual@atlantaregional.org). All questions received, and responses to those questions will be sent by email by 4:00 pm on Wednesday, November 24, 2020.

ARC must receive (1) copy in digital format (sent to [apascual@atlantaregional.org](mailto:apascual@atlantaregional.org)), either in Microsoft Word or PDF format, no later than **4:00 pm ET on December 1, 2021**.

- RFP release date: October 29, 2021
- Deadline for questions: November 17, 2021
- ARC response to questions: November 24, 2021
- Proposals due: December 1, 2021
- Contract award: Early 2022

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 December. 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 10 counties and the City of Atlanta:

Cherokee County  
Clayton County  
Cobb County  
DeKalb County  
Douglas County  
Fayette County  
Fulton County  
Gwinnett County  
Henry County  
Rockdale County  
City of Atlanta

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.

Moreover, many older adults in the metro area are not financially resilient. According to ARC's 2020 Metro Atlanta Speaks survey, many older adults are financially vulnerable, despite safety net programs like Medicare and Social Security. More than 1 in 6 residents aged 65 or older says they have significant trouble paying an emergency \$400 bill.

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.

This project includes all aspects of planning, coordinating and executing a targeted outreach campaign in support of Aging & Independence Services' Empowerline. The primary goal of this targeted outreach plan is to increase enrollment/participation in the many programs that A&I offers through Empowerline. This outreach plan will create messaging that is compelling and resonates with our targeted audiences. The plan will also include strategies to directly reach the primary customers on a regional scale as well as tailored to the needs and priorities of low-income clients in areas that ARC has identified.

### **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.

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.

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 aged 60 and older, adults with disabilities and their caregivers who are seeking info and resources to live more independent lives.

This assignment is to build upon the brand brief developed three years ago for Empowerline to ensure that those residents most in need of services are able to access them by reaching out to Empowerline. Using strategies that are based on supporting research and analysis to justify the recommended approach, the Contractor will craft messaging and prepare and implement an outreach plan to create awareness and understanding of Empowerline and have the intended audience reach out.

More specifically, calls-to-action include:

- 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 include:
  1. 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
  2. Among this audience, reach out to those with lower income and lower life expectancy. ARC has created a strategic framework to identify inequities that lead to disparities in life expectancy across all 10 counties. This framework, known as [Live Beyond Expectations](#), has identified the inequities in income, educational level, housing that contribute to low life expectancy. Reaching out to residents in Census tracts that ARC has identified as having the lowest life expectancy in the 10-county region will be a priority.

And this secondary audience:

1. Community nonprofits, community centers and other stakeholders that work with this population in the Census tracts with lower life expectancies, so that they can educate those most in need about how to access Empowerline.

#### IV. Work Tasks

The Contractor shall perform all the necessary services to include the following deliverables below. The workload percentages are projected targets for work effort and not specifically percent of budget expenditures.

<b>Deliverable</b>	<b>Projected workload percentage</b>
Creation of messaging	30%
Development of communications plan to reach targeted audiences	30%
Development of core creative campaign concepts	35%
Search Engine Optimization (SEO) plan	5%

The work to be accomplished under this proposed contract will follow this process:

##### 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).

##### Planning

This includes overall communications planning, media planning, and budget allocation. Considering previously outlined approach and budget, the Contractor will work with ARC to determine the ideal allocation of resources.

##### Message Development & Creative Concept Creation

This includes crafting messages for the audiences and creating a creative concept.

##### Media Planning

Contractor will create a media plan to determine not only the general approach but the tactical plan (i.e., which billboards, print titles, etc., specific SEO keywords and phrases). Planning includes all decision making and continues throughout the course of the initiative.

**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 \$\_\_\_\_\_

**5. Profit (Percentage rate X basis)**

Total Profit \$\_\_\_\_\_

Total Estimated Cost and Profit \$\_\_\_\_\_



B. Task Focused Budget

**Task 1: Meetings** \$ \_\_\_\_\_

**Task 2: Planning** \$ \_\_\_\_\_

**Task 3: Outreach Campaign Development & Production** \$ \_\_\_\_\_

**Task 4: Media Buying and Other Implementation Costs** \$ \_\_\_\_\_

**Total Cost:** \$ \_\_\_\_\_