

## **Request for proposal (RFP)**

**Purpose: Provision of marketing strategy and consulting services**

**Issued by**

**Aging and Disability Resource Center of Southwest Wisconsin**

**Represented by Richland County Health and Human Services**

**Proposal submission deadline: 4:30 PM CT, Thursday, April 30, 2009**

**Late proposals and submission by fax will not be accepted**

**Further information:**

**Mary Mezera (608)328-9611 [mmezera@gchsd.org](mailto:mmezera@gchsd.org) or**

**Gary Ilminen (608) 647-6384 ext.307 [ilmineng@co.richland.wi.us](mailto:ilmineng@co.richland.wi.us)**



## **Request for Proposals**

### **Marketing strategy and consulting services**

#### **Aging and Disability Resource Center of Southwest Wisconsin**

##### **Part I: Background**

###### *Background*

The Aging and Disability Resource Center (ADRC) of Southwest Wisconsin is one of a new generation of regional ADRCs being established in Wisconsin. The organization includes eight satellite ADRC locations in counties in the southwest portion of the state: Juneau, Sauk, Richland, Crawford, Iowa, Grant, Green and Lafayette. The ADRC is established as two regions. The North Region consists of satellite locations in Juneau, Sauk, Richland and Crawford counties. The South Region consists of satellite locations in Iowa, Grant, Green and Lafayette counties.

These county governments have joined with the State of Wisconsin Department of Health Services to establish a regional ADRC to provide information, advocacy, counseling and support for individuals in the community regarding access to publicly-funded long-term care options, Medicaid, Family Care, IRIS waiver program, Medicare, SSI, nutrition programs, transportation, housing, health care and much more. ADRC services are provided at no charge.

ADRCs provide individualized services to people who are elderly or who have a physical or developmental disability. People with a mental illness or a substance use disorder may receive individualized services from the Aging and Disability Resource Center or be connected to assistance through other resources. Aging and Disability Resource Centers are also available to help families and friends, caregivers, physicians, hospital discharge planners and other professionals who work with older people and people with disabilities.

The objective of this request for proposals is to procure consulting services for the development of a marketing strategy, creation of selected marketing materials and assistance with arranging outreach activities, as well as other related functions and work products.

### **Request for Proposals Timeline**

Publication of RFP announcements and release of RFP	April 8, 2009
Deadline for receipt of letters of intent to submit proposal	April 22, 2009
Deadline for receipt of complete proposals	April 30, 2009
Evaluation of proposals, recommendation action by governing boards	May 28, 2009
Notice of award, beginning of public review/protest period	June 1, 2009
Public review/submitter protest period ends	June 12, 2009
Start-up of services	June 26, 2009

1. Funding:

- a. Proposer will provide a budget for consulting services including expenses. Purchase of materials, advertising space or time and related expenditures must not exceed the overall ADRC marketing budget and are not to be included in the proposer's budget. Continuation of services in CY 2010 is subject to continued funding and approval by the Governing board of the North and South region and the Richland County Department of Health and Human Services Board.

2. Issuing agency:

- a. This RFP is issued by the Aging and Disability Resource Center of Southwest Wisconsin represented by the Richland County Department of Health and Human Services, which is the lead agency for the ADRC.

3. Project goals: The written proposal should address the following goals that are to be addressed as part of the development of a comprehensive written marketing strategy. The proposal need not include the comprehensive marketing strategy, but should describe how the strategy will meet the following goals.

- a. Defining the role of marketing in promotion of our services to include defining what approaches are currently used.
- b. Assist the regional management team in defining goals for marketing.
- c. Assist the regional management team in defining the target audiences, to include such activities as audience analysis, information gathering, developing an audience profile, and assessing the implications of the analysis. This is to include cultural competency issues such as language translation, deaf/hearing impairment and blind/visual impairment populations and other potential areas of disparity for marketing materials and other aspects of outreach.
- d. Assist the regional management team in understanding the context for the marketing plan including organizational considerations, environmental considerations and the implications of the context on the marketing strategy.
- e. Assist in defining objectives that are measurable.
- f. Develop the marketing strategy and tactics/methods. This could include but is not limited to print and electronic media planning, development of hand-out items, writing and placing articles and informational items, logo options, assisting with website development, writing and placing radio spots, outreach to professional and provider groups, civic organizations, planning event tie-ins such as Older Americans Month, Alzheimer's Awareness Month, Caregiver Month, Disabilities Awareness events and so on. Coordination between regional and local outreach activities should prevent duplication of efforts, prevent consumer confusion between the regional ADRC identity and the local satellite ADRC and allow activities at each level to reinforce one another.
- g. Identifying marketing strategy adjustments, if needed.

- h. Setting up the ADRC marketing position.
- i. Facilitation of message development.
- j. Facilitation of consistent message delivery in materials and outreach activities.
- k. Identification of partners, sponsors, champions, ambassadors and arranging/providing outreach and training for them as needed.
- l. Monitoring and evaluation of implementation of the strategy.
- m. Assessment of progress in terms of measurable goals including overall program goals.
- n. Addressing operational details.
- o. Developing a timeline for initial implementation as well as on-going activities into CY 2010.
- p. Establishing and monitoring a budget. This could include obtaining or development of cost estimates/quotes for production of materials and time costs.
- q. Community needs assessment
  - i. Identify potential disparities—cultural, disabilities populations, other.
  - ii. Demographics—generate or gather data on how many individuals over 60, physically or developmentally disabled are in the ADRC service area.
  - iii. Recommend outreach options, particularly for disabilities population

#### 4. Project design

The ADRC is soliciting marketing consultants—individuals or agencies—with demonstrated marketing expertise, preferably with entities that serve elderly individuals (over age 60), individuals with physical or developmental disabilities, mental health or substance abuse needs (age 18-59) and youth with disabilities transitioning from school-based support programs and structures to adult-oriented programs.

The ADRC as a new entity must be introduced to these target groups, as well as to professionals, service providers and the public at large. The ADRC's identity, mission and locations should be clearly expressed, so that consumers can understand how the ADRC can assist them and their family, how to contact the ADRC and where their local satellite office is located.

Beyond the introductory phase and the establishment of the ADRC's identity, the ADRC's mission and message will be consistently conveyed in the media and in outreach efforts that are planned to provide sustained visibility of the ADRC to consumers.

The consultant will design the strategy and related materials to be clear, consistent, accurately targeted and highly relevant to the target populations.

5. Definitions: The following definitions apply to terms appearing in the RFP.

**ADRC:** Aging and Disability Resource Center (of Southwest Wisconsin), the requester.

**Awardee:** The individual or agency selected to provide marketing consultant services.

**Disability:** Permanent developmental or physical disabling condition.

**Disparities:** Differences or inequities in services among various groups.

**Elderly:** Individuals aged 60 years or older.

**Family Care:** A long-term care managed care system in Wisconsin.

**HHS:** Health and Human Services. In this RFP, this refers to the Richland County Department of Health and Human Services.

**IRIS:** “Include, respect, I self-direct.” A new self-directed support waiver program in Wisconsin.

**Lead agency:** Richland County Department of Health and Human Services.

**Proposal:** Response to the RFP.

**Proposer:** Marketing consultants, individuals or agencies, submitting a proposal.

**SSI:** Supplemental Security Income for individuals with permanent disabilities.

**Target group:** Population with similar characteristics whose unique needs the ADRC is designed to address, i.e. elderly (over 60 years of age), physically disabled or developmentally disabled (age 18—59 years), youth transitioning to the adult support system, etc.

6. Who may submit a proposal:

- a. Individuals
- b. Agencies, companies or consortia
- c. Non-profit, non-governmental entities
- d. For-profit, private entities
- e. Preference is given to individual or agency submitters with experience working with public sector entities, including state and/or county government in outreach and education for the identified target groups.

Proposers must submit the following background information:

- Individuals: Resume and curriculum vitae of relevant training and experience in public relations and marketing.

- Agencies: Resume and curriculum vitae of relevant training and experience of staff to be assigned to the project.
- All proposers: Samples of deliverables from similar work.
- All proposers: Availability for start date and length of time available.
- Fee schedule or rate sheet

## **Part II: Project operational requirements and conditions**

1. Funding to awardee will be approved by the ADRC governing boards and the Richland County Health and Human Services Board.
2. Continuation of funding and services in CY 2010 is subject to availability of funds and approval by the ADRC governing boards and the Richland County Health and Human Services Board.
3. Purchase of materials, advertising space or time and related expenditures must not exceed the overall ADRC marketing budget. These costs are not included in the proposer's budget for consulting fees and expenses and will be paid directly by the ADRC to vendors.
4. Awardee must meet all the terms and conditions in this RFP and any other applicable guidance documents, applicable state and county policy requirements.
5. Awardee must participate in or be represented at project-related meetings, consultation and training activities. This may include but is not limited to Joint Regional Management Team meetings, North, South or Joint Governing Board meetings or meetings of other ADRC staff, as requested with at least one calendar week notice prior to the meeting date. Where possible, this may be accomplished by teleconference.
6. Meetings and documents relevant to the RFP and the project should be considered subject to Wisconsin open meetings and open records laws.
7. The ADRC reserves the right to negotiate the final award amount and requirements with the awardee prior to completion of any agreement for services.
8. Monthly progress reports will be provided to the ADRC beginning with the end of the first full month of service.
9. The proposer will not employ or subcontract with any employee of any of the county units of government participating in the ADRC, ADRC staff, boards or committees without agreement of the ADRC boards and full disclosure.
10. If the proposer uses subcontractors, they will be disclosed to the ADRC and the costs will be absorbed by the proposer.



11. The ADRC and lead agency are not responsible for any costs incurred by the proposers in responding to this RFP.
12. The ADRC RFP Evaluation panel reserves the right to reject any proposal and waive minor technicalities, as defined by the Evaluation panel.
13. This RFP may be terminated at any time by the ADRC. The RFP may be terminated after the award process with 30 calendar days written notice by the ADRC or the awardee. In the event of termination, the ADRC's liability will be limited to expenses incurred up to the date of the termination.
14. Payments to the awardee will be made upon receipt by the ADRC of written invoices, received by not later than the tenth day of the month following the month being billed. Billing address: Mr. Patrick Metz, Business Manager, 1000 US 14 West, Richland Center, WI 53581. Or [metzp@co.richland.wi.us](mailto:metzp@co.richland.wi.us)

### **Part III: Submission of proposals**

#### **Proposal submission deadline: 4:30 PM CT, Thursday, April 30, 2009**

Proposals may be submitted in hard copy or in electronic media. Only one submission per proposer will be accepted. The ADRC is not responsible for any lost or delayed submissions regardless of cause. No supplemental or clarifying information will be accepted from any proposer after the submission deadline.

**Paper hard copy:** Proposal must be typed, double-spaced in at least 11 point font with one inch page margins. Pages must be numbered. Proposals must not exceed 10 pages (single-side), including any attachments. Four copies of paper submissions must be received by the ADRC by the submission deadline. Late submissions and submissions by fax are not accepted. Date of possession by the U.S. Postal Service does not constitute delivery, nor does postmark. Submissions may be mailed or hand delivered to the following addresses:

Mary Mezera  
Regional Manager  
Aging and Disability Resource Center of Southwest Wisconsin-South  
Green County Human Services  
N3152 State Road 81  
Monroe, WI 53566  
Phone: 608-328-9611  
E-mail: [mmezera@gchsd.org](mailto:mmezera@gchsd.org)

Gary Ilminen, RN  
Regional Manager  
Aging and Disability Resource Center of Southwest Wisconsin - North  
Richland County Health And Human Services  
1000 Highway 14 West  
Richland Center WI 53581

Phone: (608) 647-6384 ext. 307  
[ilmineng@co.richland.wi.us](mailto:ilmineng@co.richland.wi.us)

**Electronic media:** Proposals may be submitted by e-mail to either of the preceding e-mail addresses, but the time/date stamp must allow verification of receipt by the deadline. The ADRC is not responsible for late receipt of e-mail submissions for any reason, including problems with system technology, virus protection, firewalls, etc. The proposer is responsible for verification of receipt by the ADRC by direct follow-up contact. Proposal must be in a recent version of MS Word or as a current PDF document.

Proposals may also be submitted in CD-ROM format, delivered to either of the above addresses, formatted as described above.

Proposals may be withdrawn at any time prior to the submission deadline. Resubmission or submission of an alternate proposal is allowed as long as it meets all the submission requirements and deadlines.

#### **Part IV: Evaluation and award**

All submissions will be evaluated by a committee established by the ADRC. Criteria for evaluation will include:

- Background of the proposer or proposing agency staff
- Proposer responses to each of the project goals
- Costing of the proposal

The evaluation process, including scoring system, if any, will be established by the committee. After evaluation, the committee will present the proposal it determines best meets the needs of the ADRC to the ADRC governing boards with a recommendation for approval. Final selection will rest with the governing boards.

Awardee will be notified of selection in writing. Proposers of submissions not selected will also be notified in writing. All notifications will be sent by standard mail within five business days of the board's decision. Written protests to the selection must be received within the timeline described in the RFP.

#### **Part V: Protest/appeal procedure**

Proposers can only protest or appeal possible non-compliance with procedures within the RFP. Ranking, scoring or evaluation processes used by the ADRC are not subject to protest or appeal. Protest/appeals must be received in writing by the ADRC at the same addresses as for the submission by 4:30 PM CT on the date noted on the RFP timeline. The protest/appeal must identify the specific procedure and nature of compliance being asserted. Final disposition of a protest/appeal is determined by the Lead Agency Director.