

**Request for Quotes
Executive Office of Elder Affairs
Multilingual Marketing of the Online Massachusetts Personal and
Home Care Aide State Training (PHCAST)
PRF70 Statewide Contract**

Purchasing Department: Executive Office of Elder Affairs (EOEA)

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Telephone #: 617-222-7586

RFQ File Number: EOEA RFQ 2024 004

Object Code: H19

Bid Number: **BD-24-1040-1040C-1040L-102281**

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1. Definitions

The following terms are used throughout this solicitation:

“Bidder” – An entity responding to this solicitation.

“Consumer” - An older adult who is enrolled in a Home Care program.

“Executive Office of Elder Affairs” or “EOEA” – The Massachusetts agency that serves as the Commonwealth’s State Unit on Aging.

“Homemaker” – A type of home care aide who assists a consumer with Instrumental Activities of Daily Living (IADL), including shopping, menu planning, laundry, and the performance of general household tasks, such as cleaning, when the client is unable to manage the care themselves.

“Home Care” or “Home Care Program” –a program administered by the EOEA pursuant to M.G.L. c. 19A, § 4 and 651 CMR 3.00 to assist older adults in Massachusetts to secure and maintain maximum independence in their home environment.

“Home Care Aide” – The generalized industry term for individuals who provide in-home care to older adults and people with disabilities. This term is inclusive of a variety of specific service types, including Homemaker and Personal Care services.

“Personal and Home Care Aide State Training” or “PHCAST – A free, online training provided by the Commonwealth of Massachusetts to prepare learners for a career as a homemaker and personal care homemaker.

“Personal Care Homemaker” or “PC Homemaker” – A type of home care aide who provides hands on assistance, prompting or cueing, and supervision to assist a consumer to perform Activities of Daily Living, including assistance in bathing, dressing, personal hygiene, other activities of daily living, reminders with medications in accordance with EOEAs Personal Care Guidelines, and other services specified in a consumers care plan.

“Vendor” – The entity chosen through this solicitation to complete this scope of work and enter into a contract with EOEAs.

2. Purpose of Engagement

EOEA is seeking responses to this Request for Quotes under PRF70: Advertising, Marketing & Event Planning Services for the marketing and promotion of Massachusetts’ free, online home care aide training, referred to as [PHCAST](#) (Personal and Home Care Aide State Training).

PHCAST was developed in 2011 as a 60 hour in-person course to teach the fundamentals of being a home care aide. An online version was first made available in 2021. The purpose of this engagement is to specifically promote the online training. The online training is available in English, Spanish, Haitian Creole, Brazilian Portuguese, Mandarin, Cantonese, with courses in Russian coming online in Spring of 2024.

The training has two main components:

- 1) Homemaker course – this training is 40 hours and teaches learners how to assist a consumer with Instrumental Activities of Daily Living, including shopping, menu planning, laundry, and the performance of general household tasks, such as cleaning, when the client is unable to manage the care themselves.
- 2) Personal Care Homemaker Course – this training can only be taken by learners who completed the homemaker course. The Personal Care Homemaker course is an additional 20 hours and teaches learners how to provide hands on assistance, including assistance in bathing, dressing, personal hygiene, other activities of daily living.

Additionally, PHCAST offers a Refresher Course for professionals who have prior experience as a Personal Care Homemaker and would like to refresh or build their skills and knowledge, as well as an Informal Caregivers Course for those interested in learning skills to be an unpaid caregiver who supports a family or friend as their personal care homemaker.

EOEA previously ran two paid ad campaigns to promote PHCAST in English, Spanish, and Haitian Creole. These campaigns resulted in significant enrollment boosts in PHCAST. EOEAs now requesting quotes from vendors currently on the PRF-70 Statewide Contract for the promotion of PHCAST Online, specifically the Brazilian Portuguese, Mandarin, Cantonese, and Russian courses.

Through this promotion project, the Vendor will also promote the home care professional in general as a worthwhile career path.

The two dimensions of this procurement are as follows:

- **Promotional Ad Campaign** – The Vendor will develop materials in Brazilian Portuguese, Cantonese, Mandarin and Russian with culturally appropriate/meaningful phrasing and imaging that promotes PHCAST and the home care aide profession. Materials should be customized depending on language to effectively reach the target audience (E.g., for some communities paper flyers are more effective, for others public transit advertising is more impactful). The Vendor will utilize both traditional (print, broadcast) as well as digital media advertisements to reach target audience and optimize the ad buy.
- **Enrollment Events / Community Engagement** – The Vendor will organize and implement PHCAST enrollment events. These tabling events can be held at health fairs, farmers markets, senior center events, libraries, recreational parks, culturally significant locations, and other public spaces that are frequented by the target population.

3. Whether Single or Multiple Contractors Are Required for Engagement(s)



Single Contractor*



Multiple Contractors

* The vendor must have the ability to subcontract and identify partners as needed if they cannot provide services themselves to augment expertise and communicate relevant topics and with target audiences. Preference will be given to applicants who can demonstrate a wide range of partnerships with target communities.

4. Background Information

A. About the Executive Office of Elder Affairs

EOEA was established in 1971 and serves as the Massachusetts State Unit on Aging under the Older Americans Act. EOEA strives to ensure that all older people have opportunities to live and thrive in the communities of their choice. EOEA funds and oversees programs and services to support the 1.7 million older people in the Commonwealth. Some of the services provided include Home Care, Adult Protective Services, Information and Referral, Nutrition Program, caregiver support, health and wellness services, supportive services in housing, insurance counseling, as well as dementia and behavioral health services.

5. Business Specifications:

The total budget for the project is \$500,000, which is funded by the American Rescue Plan Act of 2021 – Home and Community-Based Services and must be spent by Dec. 31, 2024.

Scope of Work

The Vendor will work with EOEAs Director of Communications and Home Care team, as well as agency leadership, to promote PHCAST to Brazilian Portuguese, Mandarin, Cantonese, and Russian-speaking communities. Throughout the contract, the Vendor will meet with EOEAs and relevant stakeholders, including EOEAs contracted home care agencies, as needed on the creative concept development, marketing campaign implementation, and other key items. EOEAs must approve all marketing and promotional materials before distribution.

The project is budgeted for a total of \$500,000 with work to be completed by December 31, 2024.

A. Phase 1– Paid Ad Campaign

a. Campaign Concepts

- i. Using existing designs from previous PHCAST marketing campaigns, the Vendor will develop a new creative campaign concept with a similar look and feel within the allocated budget.
 - The marketing concept should focus on increasing PHCAST enrollment and awareness of the training and home care aide profession.
- ii. The Vendor’s marketing strategy will focus on reaching potential learners in Brazilian Portuguese, Mandarin, Cantonese, and Russian-speaking communities.
- iii. The Vendor will propose a minimum of three campaign concepts for EOEAs agency Leadership and Communications Unit to review. Campaign proposals should include messaging that will vary based on target audience.

b. Content Creation

Develop marketing materials in Brazilian Portuguese, Mandarin, Cantonese, and Russian. The materials should include but not be limited to fliers, brochures, posters, commercials, and digital advertisements.

c. Media Buy Strategy and Ad Placement

- i. The Vendor will develop a media buy plan that outlines timeline and budget for the ad-campaign.
- ii. The media buy will focus on reaching in Brazilian Portuguese, Mandarin, Cantonese, and Russian-speaking communities. The Vendor will provide an audience segmentation strategy.
- iii. The media buy should be in the above-mentioned languages and include print, digital, and traditional ad placements, including but not be limited to billboards, MBTA stations, bus stops, as well as ads placed in high-trafficked community settings such as grocery stores, libraries, community center, childcare centers, health care centers, vocational-technical schools, YMCAs, and municipal buildings.
- iv. Once a media buy plan is approved by EOEAs, the Vendor will implement the plan.

d. Enrollment Events

- i. In conjunction with the media buy, the vendor will organize and implement community engagement enrollment events. The goal of these events is to

provide information on PHCAST, the home care aide profession/potential career path, and gain enrollees in the course.

- i. The engagement plan should include but is not limited to tabling events, canvassing, business walks, and literature drops.
- ii. Engagement events must be held in Brazilian Portuguese, Cantonese, Mandarin, and Russian. Event staffers must be fluent in the course language being promoted (native speakers preferred). If the vendor does not have staff who speak the target language, the vendor must have the ability to subcontract as needed to execute enrollment events in the target language and communities.
- iii. The Vendor must have contacts/relationships with community leaders in Brazilian Portuguese, Cantonese, Mandarin and Russian communities. Preference will be given to applicants who can demonstrate a wide range of partnerships with target communities.
- iv. The Vendor must have a proven record of multipronged, community-focused outreach approach, with an ability to switch strategies if need arises.
- v. The Vendor should consider engaging academic partners such as vocational-technical schools, adult education programs, and community colleges to host "Get to Know PHCAST" events.
- vi. General enrollment events may include the following:
 - i. An outreach team member (to be contracted and trained by vendor) who is available to explain home care profession and the value of PHCAST;
 - ii. PHCAST graduates discussing their work;
 - iii. Older adult consumers discussing the importance of home care aides in their lives;
 - iv. EOEA-contracted agencies discussing home care aide job opportunities;
 - v. Onsite enrollment opportunity and assistance;
 - vi. Community leaders on-site to promote PHCAST (e.g., elected officials, faith leaders, health leaders, business owners, community activists);
 - vii. Events banners, signs, and tablecloths;
 - viii. Uniforms, such as t-shirts, for community ambassadors and EOEA-approved PHCAST promotional products to be distributed at events.
- vii. The Vendor will support event participation through advanced planning and on-site participation, including coordinating day-of event coverage. The Vendor will draft an event calendar and engage the EOEA team to approve before finalizing event locations, dates, etc.

e. Reporting

- i. The Vendor will develop a weekly report with metrics approved by EOEA in addition to presentations (both via email and in meetings, either in person or via an online platform) on metrics and data analytics (e.g., engagements, click-thru rate, website engagement, and hits). These presentations will initially be weekly or as needed as the marketing component of the project is developed and launched, and then will shift to an as needed basis as determined by EOEA. The

Vendor will also provide a defined process to adjust and amend placement strategies based on weekly analysis; and

- ii. Draft a final summary report of recommendations and next steps for ongoing media outreach.
- iii. The Vendor will report on engagement events by providing turnout statistics and present a final report. As events are planned, EOEA will establish baseline goals for event turnout and engagement; this baseline will be used when Vendor presents turnout statistics.

f. Summary of Deliverables

- i. Develop a marketing and advertisement plan.
 - i. Develop marketing materials that should include, but not be limited to, fliers, brochures, posters, postcards, commercials, and digital advertisements.
 - ii. Develop and present a weekly report on metrics and data analytics (e.g., engagements, click-thru rate, website engagement, and hits).
 - iii. Deliver a final summary report of recommendations and next steps for ongoing media outreach.
- ii. Develop and implement a community engagement event plan that targets communities that speak Brazilian Portuguese, Mandarin, Cantonese, and Russian.

6. Bidder Response

In the **Technical Response**, please provide the following information:

- A.** Please limit the **Technical Response to 20 pages**, excluding requested attachments. Please do not submit additional materials beyond those requested in this solicitation. Bidder responses must be submitted as a single file titled “[Aging Services Network rebrand and marketing campaign] RFQ Name] – [Bidder Name] – Project Design Proposal.”
- B. Organizational Overview and Capacity** (maximum 3 pages)
Describe Bidder’s organization and Bidder’s organizational capacity to provide services described in the scope of work.
- C. Experience** (maximum 5 pages)
 - a. Summarize the Bidder’s past experience with EOEA or other state agencies and describe why the Bidder is best positioned to provide the services described in the scope of work (limit of 5 examples).
 - b. Describe prior projects (maximum 5) similar to the services described in the scope of work. Among these examples, the Bidder must demonstrate experience with the following types of projects:
 - Effectively managing large budgets with tight timelines;
 - Developing awareness campaigns designed to create behavior change, including experience developing awareness campaigns with a clear call to action. Provide

any examples of work in topics related to older adults, disability advocacy, or similar topics;

- Developing campaigns and messaging promoting disability voice and equity.
- Conducting outreach, developing innovative collateral, or using creative strategies to engage communities to complement campaign goals.

D. Approach (maximum 10 pages)

Bidder shall describe how they will implement the scope of work requirements. This section must identify the work steps proposed to meet the project requirements and the methodology or approach the bidder will use to carry out the work. The Vendor must specifically identify its plan to connect with Brazilian Portuguese, Cantonese, Mandarin and Russian communities in Massachusetts. This section must specify the number of enrollment events and community outreach opportunities there are within the specified budget. If the Vendor plans to subcontract to orchestrate engagement events, the Vendor must specify which entities the Vendor would like to subcontract.

E. Staffing (maximum 2 pages)

The project requires one dedicated project manager who has outreach/campaign experience with one of more of the following communities: Brazilian Portuguese, Cantonese, Mandarin and Russian. This one project manager must remain on the project until its conclusion. The project manager will plan and organize the project budget and resources. This includes but is not limited to identifying deliverables, scheduling, and coordinating enrollment events, managing timelines, monitoring the work plan, and efficiently guiding the project team through completion.

This section must describe the qualifications of staff proposed to serve as the project manager on this project and identify the particular skills that are relevant to this project. Identify the Project Manager who would oversee the engagement. **Attach resumes or bios of all proposed staff as an attachment.**

F. In the Cost Proposal (maximum 4 pages), do not exceed the total available budget amount listed in the RFQ. Bidders should include the following expense categories when developing their bids:

- Professional Services.** This category includes all expenses other than those related to the costs for advertising and the purchasing of equipment and software. Examples of professional services include hourly billing rates, payroll, or other personnel expenses incurred to implement or manage the scope of services (e.g., travel costs, indirect costs, etc.).
- Media Buy.** This category includes expenses for the purchase of advertisements across digital, print, and other channels.
- Enrollment events and related staffing/materials.** This category outlines expenses related to the specific number of enrollment/outreach events listed in the Vendor's approach section.
- Bidder **Cost Proposal** must be submitted as a single file titled "[Multilingual Marketing of PHCAST] RFQ Name] – [Bidder Name] – Cost Proposal." Responses must be submitted to [COMMBUYS](#) by June 28, 2024, at 5:00 PM.

G. Requested Attachments: Example Materials (maximum 15 pages for written content, and 5 minutes for recorded content) and resumes. Bidders shall submit the following examples of

previous advertising and marketing work products, which demonstrate the Bidder’s experience creating:

- a. Mission-driven marketing campaign materials;
- b. Targeted priority population campaign materials; and
- c. Examples of collateral, such as print advertisements, social media, digital advertisements, and radio spots.

7. Evaluation Criteria

- A. Experience developing strategic, community-focused communication strategies and comprehensive communication plans in the Brazilian/Portuguese, Cantonese, Mandarin and Russian communities in Massachusetts.
- B. Experience developing collateral and using creative strategies to engage key audiences and complement communication strategic plan goals.
- C. Experience collaborating with community partners and using community engagement best practices to inform proposed communications strategies.
- D. Experience developing effective media strategies designed to reach various priority audiences.
- E. Experienced key staff with demonstrated project management capabilities.
- F. Demonstrated ability to subcontract and identify partners to augment expertise to communicate about relevant topics and with different audiences as needed.
- G. Ability to develop a realistic budget and stay within its parameters.
- H. Ability to leverage in-kind resources

8. COMMBUYS Electronic Quote Requirements

All responses are to be submitted electronically using the online submission tools available to Vendors registered in COMMBUYS. There is no charge to register in COMMBUYS. To register go to www.COMMBUYS.com and click on the “Register” link on the front page.

All quotes must be received by EOEA before the specified date, month, year, and time of the Bid Opening Date displayed on COMMBUYS. Times are Eastern Standard/Daylight Savings (US), as applicable.

9. DEADLINE FOR RESPONSES AND RESPONSE INFORMATION

Deadline Date: June 28, 2024

Deadline Time: 5:00 PM EST

Will the opportunity for written questions be offered? Yes No

Online Questions (Bid Q&A)

Written Questions must be entered using the “Bid Q&A” tab for the Bid in COMMBUYS no later than the

“Online Questions Due” date and time indicated in the Estimated Procurement Calendar (below). The issuing department reserves the right to not respond to questions submitted after this date. It is the Bidder’s responsibility to verify receipt of questions.

Written Responses to Questions will be released on or about the “Responses to Questions Posted Online” date indicated in the Estimated Procurement Calendar (below).

(Written questions and responses will be posted on the Bid Q&A Tab for this Bid in COMMBUYS.)

All Bidders are advised to allow adequate time for submission by considering potential online submission impediments like Internet traffic, Internet connection speed, file size, and file volume. EOEA is not responsible for delays encountered by Bidders or their agents, or for a Bidder’s local hardware failures, such as computers or related networks, associated with bid compilation or submission. Bids submitted via COMMBUYS are time-stamped by the COMMBUYS system clock which is considered the official time of record.

COMMBUYS Item Screen

All bidders are required to enter a Unit Cost amount on the Item Screen in COMMBUYS in order to submit a quote. The acquisition method for this RFP is **Cost Reimbursement**. Bidders must enter the total dollar amount from the budget form in the Unit Cost Field.

File Format

EOEA prefers to receive non-scanned documents, though scanned documents will be accepted and must be scanned in such a way that they can be read on a computer monitor and printed on 8 ½” x 11” paper, unless otherwise specified. Zipped files will be accepted and must be in a .zip format when saved. Other file formats will not be accepted.

COMMBUYS Support

The following resources are provided to assist Bidders in submitting Quotes:

- Webcast video on [How to Find Bids \(Solicitations\) and Submit Quotes \(Responses\) through COMMBUYS](#).

Website: Go to www.mass.gov/osd/commbuys and select the COMMBUYS Resource Center link offered under Key Resources.

Email: Send inquiries to the COMMBUYS Helpdesk at COMMBUYS@state.ma.us

Telephone: Call the COMMBUYS Help Desk at 1-888-MA-STATE (1-888-627-8283). The Help Desk is staffed from 8:00 AM to 5:00 PM Monday through Friday Eastern Standard or Daylight time, as applicable, except on federal and state holidays.

Technical assistance is available during the procurement process. Every effort is made to respond to inquiries within one business day.

Bidders are advised that COMMBUYS will be unavailable during regularly scheduled maintenance hours of which all users will be notified.

Estimated Procurement Calendar

Procurement Activity	Date	Time
Bid Release Date	May 6, 2024	
Deadline for Submission of Questionsthrough COMMBUYS “Bid Q&A”	May 24, 2024	12:00 PM EST
Official Answers for Bid Q&A published(Estimated)	May 31, 2024	12:00 PM EST
Deadline for Quotes/Bid Responses (“BidOpening Date/Time” in COMMBUYS)	June 28, 2024	5:00 PM
Notification of Apparent SuccessfulBidder (Estimated)	July 12, 2024	
Estimated Contract Start Date	July 22, 2024	

Bidders are required to monitor COMMBUYS for changes to the procurement calendar for this Bid.