

Request for Proposal

Massachusetts Region 4AB Public Health Emergency Preparedness Coalition, Metro Regional Preparedness Coalition, Cambridge Health Alliance

Project Title

“Coalition-Level Crisis and Emergency Risk Communication (CERC) Guide and Workshop”

About the Region 4AB PHEP Coalition

The Massachusetts Department of Public Health (MDPH) has created six regional Health and Medical Coordinating Coalitions (HMCCs) to help cities and towns work together during public health and healthcare emergencies.

The Region 4AB HMCC, known as the Metro Regional Preparedness Coalition (MRPC), serves 60 cities and towns in the Metro Boston area (not including the City of Boston). The Region 4AB Public Health Emergency Preparedness (PHEP) Coalition is part of this regional structure and focuses on supporting local Boards of Health and Health Departments.

Cambridge Health Alliance (CHA) serves as the lead agency and fiscal sponsor for the Region 4AB PHEP Coalition.

The Coalition receives funding through a five-year Public Health Emergency Preparedness Cooperative Agreement (2024–2029) between the Centers for Disease Control and Prevention (CDC) and MDPH. This funding supports planning, training, exercises, and tools that help local Boards of Health and Health Departments prepare for and respond to a wide range of public health emergencies.

For more information about the Region 4AB PHEP Coalition, please visit our website at:
<https://region4ab.org/phep>.

Project Background

In Budget Period 2 (BP2; July 2025 - June 2026), the Region 4AB PHEP Coalition will develop a **Coalition-Level Crisis and Emergency Risk Communication (CERC) Guide** and conduct a workshop on the guide to enhance local and regional readiness for public health emergencies.

This project builds on a previously developed **Region 4AB CERC Plan Template**, which will serve as the foundation for the guide. The Coalition-Level CERC Guide will:

- Describe the Coalition’s strategies for public health crisis and emergency risk communication across all phases of an incident (preparedness, response, and recovery).
- Address health equity and communication access for high-risk and disproportionately impacted populations.

- Include strategies and tools for managing misinformation and disinformation.
- Align with local public health emergency response frameworks

A region-wide CERC workshop will be conducted no later than May 1, 2026, and the final guide and materials will be completed by June 15, 2026 for use in Budget Period 3 (BP3; July 2026 - June 2027).

Scope of Work

The Region 4AB PHEP Coalition is seeking proposals from qualified individuals or vendors to support the development of a Coalition-level CERC Guide and to design, facilitate, and evaluate an HSEEP-compliant workshop on the guide. All 60 Region 4AB communities will be invited to participate in the workshop, with participants including public health staff, communications staff, and emergency partners.

The selected vendor will collaborate with the Coalition's Project Management Team (PMT) and follow a structured process to achieve the Scope of Work outlined below.

1. Conduct a project launch and planning team meetings.

The selected vendor will conduct a project launch meeting **within 7 business days** of the contract being executed. The purpose of the meeting is to confirm goals, view key background materials, define roles and responsibilities, and finalize the overall project schedule.

2. Develop a draft Coalition-Level CERC Guide.

The selected vendor will review the existing Region 4AB CERC Plan Template and draft a Coalition-Level CERC Guide that includes or expands information on:

- Roles and responsibilities
- Message development and review
- Clear and accessible messaging
- Social media coordination
- Media relations
- Maintaining credibility and trust
- Communication access, equity, and Access and Functional Needs (AFN) considerations
- Monitoring and responding to mis/disinformation

3. Design and deliver a Workshop on the Coalition-Level CERC Guide.

The selected vendor will design and deliver an interactive CERC workshop to review and improve the draft Coalition-Level CERC Guide. The workshop will be Homeland Security Exercise and Evaluation Program (HSEEP)-compliant. The selected vendor will draft all HSEEP-required documentation for review and approval. This includes:

- Situation Manual (SitMan)

- Facilitator Guide
- Evaluator Guide and Exercise Evaluation Guides (EEGs)
- Participant Feedback Form
- Invitation and registration materials
- Plain-language summary of the workshop and discussion objectives

The vendor will be responsible for developing all workshop materials, including a facilitation guide, agenda, discussion points, and participant handouts. The workshop will include public health, communications staff, and local planning partners from across Region 4AB communities.

The vendor will facilitate the workshop and collect structured feedback through discussion and participant evaluation forms. This feedback will be used to identify strengths, gaps, and recommendations for improving the guide. The workshop must be completed by May 1, 2026.

NOTE: The Coalition anticipates hosting a CDC CERC training in advance of the workshop to orient coalition members on CERC concepts. The selected vendor will **not** be responsible for organizing or facilitating the training.

4. Finalize the CERC Guide and develop implementation tools.

After the workshop, the selected vendor will revise (if needed) the draft Coalition-Level CERC Guide based on feedback gathered during workshop discussions and through participant evaluations. The final guide should be clear, practical, and ready for use by local Boards of Health and Health Departments during any type of public health emergency. To support local adaptation, the vendor will also develop a one-page implementation checklist. This checklist will help communities customize and apply the guide to their local needs. The final guide and checklist must be submitted in both Microsoft Word and PDF formats by no later than June 15, 2026.

Deliverables and Completion Dates

The following timeline outlines expected deliverables for the Coalition-Level CERC Guide and workshop. This timeline is approximate and may be refined during the project launch meeting with the selected vendor. All work will be conducted in consultation with the Project Management Team (PMT).

1. Project Launch Meeting

The selected vendor will participate in a virtual project launch meeting **within 7 business days** of the signed contract. The meeting will:

- Review project goals, deliverables, and timelines
- Define project roles and responsibilities
- Establish a timeline for check-ins and deliverables

2. Workshop Planning Meetings

The selected vendor will lead a series of planning meetings in line with HSEEP guidance, including:

- Concept and Objectives (C&O) Meeting
- Initial Planning Meeting (IPM)
- Midterm Planning Meeting (MPM)
- Final Planning Meeting (FPM)

3. Coalition-Level CERC Guide

The selected vendor will draft the Coalition-Level CERC Guide with input from PMT to be circulated for internal review in January 2026. The final Guide must be completed by June 15, 2026. This guide will include information on:

- Roles and responsibilities
- Message development and review
- Clear and accessible messaging
- Social media coordination
- Media relations
- Maintaining credibility and trust
- Communication access, equity, and Access and Functional Needs (AFN) considerations
- Monitoring and responding to misinformation

4. Workshop Materials, Facilitation, Report

The selected vendor will develop an HSEEP-compliant workshop and design all materials. Examples of workshop materials include, but are not limited to, flyers, agendas, sign-in sheets, workshop scenarios, workshop manuals, evaluation guides, and discussion questions. The vendor will facilitate an interactive workshop and be responsible for workshop registration, facilitation, and evaluation in the form of participant feedback and a summary report of the project workshop. The workshop must be completed by May 1, 2026.

5. Final Coalition-Level CERC Guide for Implementation

Following the workshop, the selected vendor will incorporate feedback into the Guide and distribute materials to the PMT. The vendor will develop an implementation checklist for communities to support local adaptation of the Guide for implementation in the following budget period.

Project Outputs

The following outputs reflect the scope of work described in this RFP. These outputs may be refined during project implementation based on input from the selected vendor, subject matter experts, or the PMT.

- **Project Planning and Coordination**
 - Project launch meeting summary with finalized roles and schedule
 - Weekly or biweekly meetings with the PMT
 - Documentation of HSEEP planning meetings, including:
 - Concept and Objectives Meeting (C&O)
 - Initial Planning Meeting (IPM)
 - Midterm Planning Meeting (MPM)
 - Final Planning Meeting (FPM)
- **Coalition-Level CERC Guide (Draft and Final)**
 - A plain language, editable, and locally adaptable CERC guide that supports public health communications for all hazards.
 - At minimum, the guide will include roles and responsibilities, message development, clear messaging, social media coordination, media relations, maintaining credibility, access and functional needs (AFN) and equity considerations, and mis/disinformation.
- **CERC Implementation Checklist**
 - A one-page tool to support roll-out and use of the guide by local public health.
- **Workshop Materials and Facilitation**
 - Draft and final versions of all workshop materials (e.g., flyer, agenda, discussion guide, sign-in sheet, participant feedback form, etc.).
 - Delivery of an HSEEP-compliant workshop inclusive of public health, communications, and emergency management personnel
 - Draft and final versions of all required HSEEP-compliant materials, including:
 - Situation Manual (SitMan)
 - Facilitator Guide
 - Evaluator Guide
 - Exercise Evaluation Guides (EEGs)
 - Participant Feedback Form
- **After-Action Report / Improvement Plan (AAR/IP)**

Following the workshop, the selected vendor will submit a draft HSEEP-compliant AAR/IPs **within 14 business days**. The reports will include a summary of the workshop, discussion themes, and key recommendations.
- **Project Planning and Coordination**
 - Project launch meeting summary with finalized roles and schedule

- Weekly or bi-weekly check-in meetings with the PMT
- **Final Materials**
 - All final documents should be submitted in Microsoft Office and PDF formats.

Vendor Requirements

The individual or vendor submitting a proposal should meet the following requirements. If the lead vendor does not meet all requirements directly, they may subcontract with individuals or organizations that do.

- **Crisis and Emergency Risk Communication Experience**
The vendor should have experience with crisis and emergency risk communication, including familiarity with CDC CERC principles and tools.
- **Health Equity and Communication Access**
The vendor should understand how public health emergencies can disproportionately impact populations and how to ensure inclusive, accessible messaging. The vendor should be experienced in integrating health equity considerations into communication practice.
- **Public Health Emergency Preparedness Experience**
The vendor should have experience developing public health emergency preparedness plans, frameworks, or tools. This includes familiarity with the CDC PHEP Capabilities and Massachusetts-specific systems (e.g., WebEOC, MAVEN, ICS/NIMS).
- **Experience with HSEEP-Compliant Exercises**
The vendor should have demonstrated experience planning, facilitating, and evaluating discussion-based exercises that follow the **Homeland Security Exercise and Evaluation Program (HSEEP)**. The vendor should be familiar with HSEEP documentation standards, meeting structures, and AAR/IP development.
- **Virtual and In-Person Facilitation Skills**
The vendor must be able to plan and facilitate meetings and exercises both virtually and in person. The vendor should be prepared to use flexible formats (e.g., regional, sub-regional, hybrid) based on what best supports engagement across the region.
- **Workshop or Presentation Experience**
The vendor should be able to present project findings and materials at meetings or workshops (virtually or in person). Experience developing visual materials (e.g., PowerPoint slide decks) for public health audiences is required.

- **Technical and Writing Skills**

The vendor must be able to develop deliverables in Microsoft Office (Word, PowerPoint, Excel). The vendor should have experience producing clear, actionable written materials that are easy to use.

- **Communication and Coordination**

The vendor will work closely with the PMT, which may include MRPC staff, MDPH staff, and representatives from Region 4AB communities. Regular updates and collaboration will be expected throughout the project.

Project Budget and Proposal Submission Requirements

The total contract amount **may not exceed \$30,000**. This amount must include all costs related to staff time, project meetings, deliverables, travel (if applicable), and materials production (electronic and printed). All project deliverables must be completed, and all invoices submitted, by June 30, 2026. The payment schedule will be based on agreed-upon terms and tied to deliverable milestones, as outlined in the project contract.

Proposal Submission Instructions

Please submit your complete proposal by **12:00 PM EST on Wednesday, September 3, 2025** to: **hmcc@challiance.org**.

Proposals should include the following:

- **Project proposal:** A brief proposal outlining the proposed approach, including format recommendations, timeline (subject to change based on the project start date), and engagement strategy
- **Draft deliverables schedule:** A draft list of outputs and estimated completion dates (timeline may be adjusted during contracting)
- **Detailed budget estimate:** Including personnel hours, hourly rates, subcontractor costs (if applicable), and a detailed budget justification
- **Resumes or bios:** For all individuals who will be involved in the project
- **Organizational summary:** A brief description of the submitting individual, organization, or business entity, including relevant experience and qualifications
- **Sample work product:** At least one relevant writing or planning sample

Incomplete submissions may not be reviewed. Final selection will be based on the evaluation criteria described in this RFP.

Evaluation and Selection Criteria

Proposals will be reviewed by Region 4AB PHEP staff and/or members of the Coalition's Executive Committee. The contract will be awarded to the vendor whose proposal best meets the needs of the project as outlined in this RFP. Proposals will be evaluated based on the following criteria:

Criteria	Description
Relevant Experience	Demonstrated experience developing CERC materials and supporting public health communications planning, as well as designing, facilitating, and evaluating HSEEP-compliant workshops. Experience working with public health, emergency management, and municipal staff is strongly preferred.
Approach and Methodology	Clear and realistic proposal for guide development and workshop delivery.
Multidisciplinary and Regional Engagement	Ability to effectively engage all 60 Region 4AB communities and multidisciplinary teams. Includes strategies for virtual, in-person, or hybrid delivery and coordination across jurisdictions.
Health Equity and Accessibility	Ability to develop inclusive, accessible communication strategies and materials.
Work Samples	Quality, clarity, and relevance of submitted writing or planning samples.
Project Management and Timeline	Feasibility of proposed timeline and deliverables. Ability to meet deadlines, respond to feedback, and coordinate with the Project Management Team.
Budget and Justification	The budget is reasonable, clearly justified, and aligns with the proposed scope of work.

The Region 4AB PHEP Coalition reserves the right to request additional information, interview applicants, or reject any or all proposals.

Contact for Questions

Questions about this RFP may be submitted by email to hmcc@challiance.org.

Informational Resources

The following resources will be provided upon contract start:

- Region 4AB Crisis and Emergency Risk Communication Plan template
- Region 4AB HMCC Hazard Vulnerability Assessment (if applicable)