

Request for Proposals

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

Project Title

“Discussion-Based Exercise: Public Health Emergency Response Framework”

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), each municipality in the region will develop an all-hazards public health emergency response framework (please see the associated RFP: “All-Hazards Public Health Emergency Response Framework”). This framework will outline the roles and responsibilities of local Boards of Health and Health Departments before, during, and after a range of public health emergencies, with a focus on population impacts, health equity, and coordination with emergency management and public safety partners.

The project outlined in this RFP will support the planning, facilitation, and evaluation of a **Homeland Security Exercise and Evaluation Program (HSEEP)-compliant discussion-based exercise** that will test the implementation of the framework across all 60 Region 4AB communities. Multidisciplinary participation is expected from public health, emergency management, public safety, and Medical Reserve Corps (MRC) Unit Coordinators.

The exercise may be delivered as a single region-wide event, multiple sub-regional events, or other formats that support full and equitable participation. Exercises may be held virtually, in person, or in a hybrid format. All exercise activities must be completed by **January 31, 2026**, and all final reports submitted by **March 30, 2026**.

Scope of Work

The Region 4AB PHEP Coalition is seeking proposals from qualified individuals or vendors to design, facilitate, and evaluate an HSEEP-compliant discussion-based exercise on each community's all-hazard public health emergency response framework. The exercise will involve all 60 Region 4AB communities (exercising their town-specific framework) and include multidisciplinary teams representing public health, emergency management, public safety, and Medical Reserve Corps (MRC) Unit Coordinators.

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

1. Conduct a project launch and planning team meetings.

The selected vendor will conduct a project launch meeting **within 7 business days** of contract execution. The purpose of the meeting is to confirm goals, review key background materials, define roles and responsibilities, and finalize the overall project schedule. Each meeting will include the PMT and will guide the development and finalization of all exercise design and evaluation materials. The vendor will facilitate a series of virtual PMT meetings in accordance with HSEEP guidelines, including:

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

2. Develop exercise design and evaluation materials.

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 exercise scenario and discussion objectives

Materials should be adaptable for use in one large regional exercise, multiple sub-regional exercises, or a phased approach based on community readiness. All materials must incorporate:

- Key public health functions from the all-hazards public health emergency response framework
- Realistic scenarios that reflect local hazard vulnerability
- Integration of public health, emergency management, public safety, and MRC partners

3. Facilitate one or more regional or sub-regional exercises.

The selected vendor will deliver one or more discussion-based exercises involving all 60 Region 4AB communities. The vendor will provide trained facilitators and evaluators to support all sessions. The exercise(s) may be delivered:

- Virtually, in person, or using a hybrid model
- As a single regional exercise or multiple sub-regional or cohort-based sessions, depending on readiness and logistics

Each exercise must:

- Follow the HSEEP discussion-based exercise format
- Use the SitMan and structured discussion to examine response roles, decision-making, and coordination with public safety and community partners
- Include scenario-based prompts and facilitate equitable participation across all required sectors

4. Collect and analyze exercise data.

The selected vendor will collect feedback from participants using standardized forms and evaluator notes. Feedback will be organized by jurisdiction and discipline to inform both regional and local improvement planning. The vendor will identify:

- Strengths, gaps, and areas for improvement in implementing the framework
- Training, coordination, and resource needs
- Cross-jurisdictional and multi-agency coordination challenges

5. Develop and submit an After-Action Report/Improvement Plan (AAR/IP).

The selected vendor will draft and finalize an HSEEP-compliant AAR/IP, one for each municipality that participated in the exercise, for a total of 60 AAR/IPs. The AAR/IP must be **submitted to MDPH no later than March 30, 2026**, in both PDF and editable Word formats. At minimum each AAR/IP must include:

- An executive summary
- A regional summary of discussion themes and findings
- A discussion of jurisdiction-specific themes and findings

Each appendix should summarize:

- Local participation and input
- Key gaps and strengths identified
- Priority actions or next steps for local framework implementation

6. Provide project updates and closeout.

The selected vendor will participate in regular meetings with the PMT throughout the project. These meetings will be used to review drafts, confirm logistics, and ensure alignment with deliverables and deadlines. The vendor will also prepare a brief project closeout summary highlighting lessons learned and implementation recommendations.

Deliverables and Completion Dates

The following timeline outlines expected deliverables for the discussion-based exercise(s). 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 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
- Confirm exercise format and schedule
- Define project roles and responsibilities
- Establish a timeline for planning meetings and deliverables

2. Exercise 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)

Planning meetings will be scheduled in consultation with the PMT and may be held virtually. Meeting summaries and updated planning documents will be provided following each meeting.

3. Exercise Materials (Draft and Final)

Within 15 business days of the Final Planning Meeting, the selected vendor will submit all final HSEEP-aligned exercise materials, including:

- Situation Manual (SitMan)
- Facilitator and Evaluator Guides
- Exercise Evaluation Guides (EEGs)

- Participant Feedback Form
- Recruitment and invitation templates

Drafts of these materials will be submitted in advance of the Final Planning Meeting for review and feedback.

4. Exercise Facilitation

The selected vendor will facilitate one or more discussion-based exercises involving all 60 Region 4AB communities. Exercises must:

- Be **completed by January 31, 2026**
- Include **participation from public health, emergency management, public safety, and MRC representatives**
- Be delivered either as a single regional event or as multiple sub-regional or virtual sessions

The vendor will be responsible for session facilitation, technical and logistical support, participant engagement, and collection of evaluation data.

5. After-Action Report / Improvement Plan (AAR/IP)

Following the final exercise session, the selected vendor will submit draft HSEEP-compliant AAR/IPs **within 14 business days**. The reports will include:

- An executive summary
- A regional summary of findings
- Jurisdiction-specific summary of findings for each community

The PMT will review the drafts and return feedback **within 7 business days**. The vendor will submit a final AAR/IP **within 7 business days** of receiving feedback. The final reports must be submitted to MDPH by **March 30, 2026**.

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)

- **Exercise Design and Materials**
 - 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
 - Plain-language recruitment and invitation materials
 - Materials designed for use in one or more virtual, in-person, or hybrid sessions
- **Exercise Facilitation**
 - Delivery of one or more discussion-based exercises involving all 60 Region 4AB communities
 - Inclusive participation from public health, emergency management, public safety, and MRC Unit Coordinators
 - Participant sign-in records, evaluation data, and session notes collected for each exercise
 - Adaptable delivery model (single regional, sub-regional, or cohort-based) based on community readiness and logistics
- **Evaluation and Reporting**
 - Compilation and analysis of participant feedback and evaluator observations
 - 60 Draft and final AAR/IPs, including:
 - Executive summary
 - Findings and improvement priorities
 - Community-specific summaries for each community
 - Final report submitted in Microsoft Word and PDF formats
- **Summary Materials**
 - PowerPoint slide deck summarizing exercise goals, discussion themes, and key findings
 - Prepared for use at Region 4AB PHEP Coalition meetings or stakeholder briefings

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.

- **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.

- **Familiarity with Public Health and Emergency Management Systems**

The vendor should have experience working with local public health departments, emergency management, public safety agencies, and MRC volunteers. Experience working in or with municipalities in Massachusetts is strongly preferred. Knowledge of systems such as **WebEOC**, **MAVEN**, and relevant **Massachusetts CMRs** is beneficial.

- **Multidisciplinary and Regional Coordination**

The vendor must be able to coordinate and communicate with a diverse set of stakeholders, including public health officials, emergency managers, law enforcement, and MRC Unit Coordinators across all **60 Region 4AB communities**. Experience working with regional coalitions or multi-agency preparedness groups is preferred.

- **Equity and Accessibility Focus**

The vendor should demonstrate an understanding of **health equity, access and functional needs**, and the importance of **inclusive emergency planning**. Exercises must support the full and meaningful participation of communities with varying levels of readiness.

- **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.

- **Project Management and Communication**

The vendor should be able to manage complex timelines and respond to feedback in a timely manner. The vendor must schedule and lead planning meetings and coordinate deliverables with the PMT.

- **Technical and Writing Proficiency**

The vendor must be able to develop all materials and reports in **Microsoft Office (Word, Excel, PowerPoint)**. The vendor should have experience producing clear, actionable written materials in accordance with HSEEP and plain language principles.

- **Collaboration with Project Management Team**

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, exercise facilitation and evaluation, travel (if applicable), technology or virtual platform support, and materials production (electronic and printed). All

project deliverables must be completed, and all invoices submitted, by April 10, 2026. Payment terms will be outlined in the project contract and may be linked to the completion of specific deliverables.

All exercise deliverables must be completed by **January 31, 2026**, and all AAR/IPs submitted to the Coalition in advance of its submission deadline to MDPH by **March 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 (e.g., regional vs. sub-regional), 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 example of an HSEEP-compliant exercise document (e.g., SitMan, AAR/IP, or facilitator guide)

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 designing, facilitating, and evaluating HSEEP-compliant discussion-based exercises. Experience working with public health, emergency management, public safety, and MRC partners is strongly preferred.
Approach and Methodology	Clear, realistic proposal for exercise design and delivery, including suggested format (regional or sub-regional), participant engagement strategies, and evaluation of

	municipal public health emergency response frameworks.
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	Incorporation of health equity, access and functional needs, and inclusive practices in exercise planning, facilitation, and reporting.
Work Samples	Quality, clarity, and relevance of submitted HSEEP-compliant samples (e.g., SitMan, AAR/IP, facilitator guides).
Project Management and Timeline	Feasibility of proposed timeline and deliverables. Ability to meet deadlines, respond to feedback, and coordinate with the PMT.
Budget and Justification	The budget is reasonable, clearly explained, and appropriate to the scope of work. Includes itemized cost estimates and justification for proposed expenses.

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:

- Municipal public health emergency response frameworks
- Region 4AB HMCC Hazard Vulnerability Assessment (if applicable)
- Background on the Region 4AB PHEP Coalition and its member communities