



Request for Proposal

The Affordable Assisted Living Coalition (AALC) is seeking proposals to provide public relations and marketing support for our nonprofit, membership-supported organization and the Supportive Living Program (SLP). This Request for Proposal (RFP) presents background on the Coalition, as well as an outline for the scope of work to be accomplished by the consultant or consulting agency contracted. If your company wishes to be considered for this opportunity, please submit a written proposal that addresses the points detailed in this RFP no later than Friday, January 28, 2011. Selection of a service provider is anticipated in first quarter 2011.

I. Organization Background

AALC is a 501(c)(6) not-for-profit corporation, headquartered in Springfield, Illinois. Our mission is to preserve, protect and promote affordable assisted living - especially the SLP.

Membership: AALC's general membership includes individuals and entities that develop and/or operate affordable assisted living projects under the SLP. Business partners who have an interest or are involved in the SLP are involved as Associate and Premier Associate members.

While many membership organizations have been negatively impacted in recent years by the troubled economy, AALC's membership has continued on an upward trend. Currently, 121 of 123 operating Supportive Living Facilities (SLFs) are members of AALC. Of the 37 approved, but not-yet-open SLFs, 19 have already joined or will be joining soon.

Our Work: By advancing best practices, providing strong leadership, and developing strategic partnerships and alliances, the Coalition aims to advance SLP as the premier affordable assisted living model in the country. For our members, AALC focuses on providing the following areas of benefit:

- Advocacy & Government Relations
- Training, Education, & Networking
- Public Relations & Promotion
- Access to Financing

Leadership: AALC's current Executive Director has over 30 years of experience with Illinois' government in the Department of Healthcare & Family Services. He is a recognized authority on the SLP and works to bring SLFs together with the regulatory state agencies to ensure the program works for all. He works with the AALC Board of Directors to develop membership programs and benefits that support the SLP and advance the goals of the organization.

Current PR/Marketing Theme: Care, compassion, comfort and cost – like pieces of a puzzle that belong together, supportive living arrangements only work when those four critical elements unite to form a complete picture.

Key Acronyms: AALC – Affordable Assisted Living Coalition
SLP – Supportive Living Program
SLF – Supportive Living Facility or Supportive Living Facilities

II. Needs/Goals

In order to understand the challenges faced by AALC as an organization, it is important to understand the distinction between typical assisted living programs and the Supportive Living model that is being advanced by AALC.

In traditional assisted living programs, participants are provided with housing and an array of services aimed at helping them to maintain that living arrangement as long as possible. However, the price tag can be costly and assisted living programs cannot accept Medicaid as a form of payment. Residents are generally forced to leave when they can no longer afford to pay for the service.

The alternative that is being advanced by AALC is a model of affordable assisted living, which is currently only available through Illinois' SLP, operated under a Medicaid waiver through the Illinois Department of Healthcare and Family Services. Through SLP, qualifying residents CAN use their Medicaid benefits, which allows them to remain in their SLP home without the burden of how to make payment.

The 123 facilities that are currently operational in Illinois have a capacity to serve over 9,500 individuals who might otherwise be living in nursing homes or unsafely at home.

AALC has identified several goal areas toward which we would prefer the contracted service provider's efforts be directed:

- Helping the general public understand SLP as a preferred model of affordable assisted living;
- Driving interest and referrals to our member facilities;
- Promoting the overall success of the SLP - capturing the positive results and success stories that are happening in our member facilities and conveying those to the public and to decision-makers in a manner that reinforces the need for SLP here in Illinois and beyond; and
- Advancing our organization as the leading industry representative in matters of legislation and regulation that impact supportive living providers.

Since our inception, the Coalition has continually worked to promote SLP and our member organizations. Existing efforts which could be leveraged by the chosen service provider include:

- **Website** – www.aalconline.org – provides information for those seeking to learn more about the SLP and association members. Through the site, AALC promotes the SLP model and explains the benefits of membership. Prospective members can download an application, and current members can access members-only resources and documents.
- **“Q and A” Brochure** - AALC publishes a brochure for facilities to help communicate the differences between private pay assisted living, nursing homes and supportive living facilities. A copy is found on the AALC website. The brochure is also available to order from AALC.
- **Supportive Living PowerPoint** - AALC offers members the ability to promote the SL program through an animated PowerPoint presentation. It is also available for download from the AALC website.
- **Evidence-Based Programs for Older Adults** - AALC promotes the SLP as a health and wellness model of AL and has obtained two Federal ARRA grants to implement evidence-based programs in SLFs. Five SLFs have conducted “Chronic Disease Self-Management Programs” (CDSMP) and another three SLFs have implemented “Fit & Strong” Programs as a means of demonstrating that SLFs are a place to come for healthy aging.
- **SLF Week Activities** - AALC's major public relations and promotion event occurs in the Spring. “Supportive Living Week”, held in 2010 from April 25-29, celebrates the success of the SLP as an alternative for seniors and persons with physical disabilities.

One of the objectives of the Affordable Assisted Living Coalition's Supportive Living Week is to illustrate the fact that our communities provide the "missing piece" of affordability to the seniors housing puzzle. During this week, we let the public and our leaders know that the SLP is a valuable and flourishing program that is vital to our state.

2010 SLF Week Activities included:

- ▶ **Wii Bowling Championship** – Our first annual tournament occurred in 2010. Member facilities put together teams of up to 6 bowlers, with a total of 37 teams competing in 2 divisions. The event was an exclusive tournament just for Illinois SLF residents and was sponsored by the National Senior League. Teams bowled once a week for 7 weeks, and then the top 8 teams in each division battled in a 2 week-playoff. AALC hosted a live video stream of the event so fans could watch. Our enthusiastic Final Four bowlers and their fans had a fantastic time, and their story was followed and reported by both the ABC and NBC local television affiliates. The event culminated with an awards ceremony and luncheon, with medals for each participant and trophies for each of the Final Four teams.
- ▶ **Meet-and- Greet with Governor Pat Quinn** – Each year, AALC schedules a meet-and-greet opportunity for SLF residents with the Governor during SLF week. This not only provides an enjoyable opportunity for residents, but also reinforces awareness of the program at the highest levels in State government.
- ▶ **2010 Photo Contest** – SLFs submitted their best photos demonstrating how Supportive Living positively impacts the lives it touches. AALC awarded prizes for 1st, 2nd, and 3rd place. Our annual AALC report always features the winning photos and other photos received during the contest.
- ▶ **“Missing Pieces” on Parade** - Like the famous Chicago Cows on Parade, the Supportive Living “Missing Pieces” on Parade exhibit included over fifty 4 ft x 4ft wooden puzzle pieces decorated by Illinois' Supportive Living communities. Each participating facility displayed its piece as part of a state-wide public art awareness campaign to illustrate the many faces of supportive living. Together, the pieces showed the faces and stories of those whose lives are better because of Illinois' model program. A few select pieces were on display at the State Capitol on April 27, during the Meet-and-Greet with the Governor.
- ▶ **State-wide Open House** – AALC invites all member facilities to participate in a state-wide open house during SLF Week. Members were encouraged to invite visitors to tour their facilities and share AALC's PowerPoint presentation on the Supportive Living program. Many facilities also planned other special events for their residents and guests during this time.
- ▶ **Open House Tool Kit** – Assembled especially for AALC members, this free tool kit contains sample documents and marketing materials to help facilities plan their own open houses and other special events during SL Week. The kit included an SLP backgrounder, sample supportive living PowerPoint presentation, legislative lobbying toolkit, media relations templates, ideas for planning celebrations with residents, families and staff, guidelines for state-wide consumer education event and various sample communications materials.

- ▶ **Product Sales** – AALC also designs and develops products to help residents and staff promote the SLF. Such items have included lapel pins, stickers, t-shirts, balloons, posters, direct mail pieces, and a puzzle featuring the photos from the Photo Contest. All items feature the Supportive Living 4 C's logo to promote the SLP's principles of care, compassion, comfort and cost.

III. Scope of Work

AALC wishes to partner with a consultant or consulting agency that can understand who we are as a membership organization and assist us in advancing supportive living in Illinois and beyond. The successful bidder will be an organization that can demonstrate a proven track record in campaign planning and execution.

Anticipated activities include:

- Development of a strategic PR/marketing plan and timeline for roll-out of the campaign;
- Design or redesign of AALC's core marketing pieces, which currently include a brochure, PowerPoint, SLF week marketing materials, website;
- Eliciting media opportunities and pursuing media coverage for planned events;
- Press release development and distribution, anticipating 1-2 per month on topics which could be of statewide or local relevance;
- Identification, pitching and leverage of speaking and/or conference participation opportunities;
- Planning and implementing all marketing associated with our annual SLF week activities;
- Managing media opportunities and tracking campaign results;
- Quarterly reporting to the Board of Directors.

AALC has administrative and lobbying resources in place which will be coordinated with the marketing activities for maximum impact.

We are potentially interested in having the consultant or consulting agency conduct training for our members on how to handle media inquiries and maximize marketing for their individual facilities. This could be part of first year activity, depending on the resources/experience of the contracted service provider.

The successful service provider will work with AALC to establish agreed-upon goals with milestones, deliverables, timelines and a report-back mechanism whereby AALC can quickly and easily ascertain whether or not key success indicators are being met.

IV. Budget

AALC is open to recommendations regarding the investment which would be required in order to achieve our public relations/marketing goals. We are considering a budget of approximately \$25,000/year for work performed under this contract. We anticipate offering an annual contract to the successful bidder, but reserve the right to cancel any contract with 30 days notice.

V. Agency Selection Criteria

To be considered, a service provider must be an individual or consulting agency with expertise in public relations, marketing and/or media relations. The consultant must be able to demonstrate her/his ability to successfully create and support implementation of a marketing plan for nonprofit organizations and her/his understanding of AALC. The successful consultant may be asked to meet with the AALC Executive Director and/or members of the selection committee as part of the selection process.

Selection criteria include:

- Compliance with this RFP
- Demonstrated understanding of the project
- Detail of services to be provided
- Track record of success in developing and supporting marketing plans
- Qualifications of the agency
- Competitive fees
- References

V. Timeline / Selection Process

To be considered, a written proposal must be received by AALC no later than 5:00 pm (CST) on Friday, January 28, 2011. Questions may be submitted via email. Required elements for responses are provided on p. 6 of this RFP.

Electronic submissions are strongly encouraged. Following proposal submission and the initial review process, all respondents will be notified of the outcome. Face-to-face or Web presentations **may** be scheduled based on submission finalists. Not all submissions will warrant a personal presentation.

Selection of the successful service provider is anticipated in early 2011, with services to begin as soon as possible following selection.

All proposals submitted will be considered proprietary and not available for viewing by any competing individual or agency.

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REQUEST FOR PROPOSAL – REQUIRED ELEMENTS FOR RESPONSE

1. Overview / Capabilities

- Please provide a brief overview of your service history.
- Describe your philosophy with respect to public relations, marketing and media relations.
- Describe the capabilities you possess that are relevant to AALC's needs.

2. Services

- Describe how you differentiate your services from competitors.
- Please provide a list of representative clients, Illinois-based and/or out-of-state. Highlight those clients who are from the healthcare, housing or nursing home industry.
- Please describe several positive client relationships and why you feel the relationship has been successful.
- What is the average term a client works with you?
- Do you have any clients that might pose a conflict to managing our account?

3. Evidence of Results

- Describe your experience with other clients that have had similar needs.
- Which clients would you consider to be your greatest success stories?
- What success factors do you feel need to be present in order for you to achieve results for a client?

4. Recommended Approach

- Based on the information you've gleaned from this proposal and from reviewing AALC's website, describe how you would envision addressing AALC's needs.

5. Key Staff

- Provide a brief bio for any individuals who would be responsible for the AALC account.
- Please provide client references for any staff person who would be working on the AALC account.
- How do you handle staff turnover for your company?
- Do you engage in outsourcing of services to other vendors? If yes, how do you select your outsourcing partners?

6. Budget / Cost of Services

- How do you bill for services and costs?
- What is your mark-up for time, retainer and/or expenses?
- Please suggest a budget that would encompass your proposed services.