

# Request for Proposals

## *Communications Consultant*

The Institute for Medicaid Innovation (IMI) is passionate about improving the lives of Medicaid enrollees, their families, and communities through the development, implementation, and diffusion of innovative solutions. IMI is a national 501(c)3 nonprofit, nonpartisan research, policy, and community power-building organization that provides independent information and analysis to inform Medicaid policy and improve the health of the nation. The work of IMI is informed, guided, and supported by an exceptional group of national experts representing academic and non-academic research institutions, advocacy and community organizations, clinician groups, Medicaid managed care organizations, state, and federal policymakers, and, most importantly, individuals, families, and communities. The Institute for Medicaid Innovation's strategic priorities provide both guardrails and guidance for strategically aligning its work with its mission.

### Service Requested

IMI is inviting proposals from strategic communications consulting firms interested in providing a range of services to our nine-person staff and Governing Board. IMI produces a number of public-facing products and routinely communicates with our partners, funders policymakers and the community. Equity anchors all of our work and is central to the mission of IMI. Your proposal should be prepared under the expectation of at least a one-year relationship, although IMI will reserve the right to terminate the relationship at any time for any reason with 60 days prior written notice.

As an anti-racist and gender inclusive organization, IMI employs and engages with partners and collaborators without regard to age, race, ethnicity, national origin, sex, gender, religion, political affiliation, marital status, or disability. We are continuously learning, growing, and building a culture that encourages, supports, and celebrates the diverse voices of our employees, partners, and collaborators. Diversity and inclusion fuel our innovation and connect us to the Medicaid community we serve.

### Scope of Work

IMI seeks proposals for contracted communications services from a boutique firm in the DC area with a team that can offer both strategic support at the senior level and general support at the junior level. All applicants must have relevant nonprofit experience, particularly communications for organizations that prioritize community voice and diversity, equity, inclusion, and justice (DEIJ). IMI will pay the selected vendor a monthly retainer as part of an annual fixed fee agreement for the services outlined below with the contract beginning January 1, 2025.

The organization selected will be responsible for providing the following services:

#### *Routine Communications Work*

- Draft and design a monthly IMI newsletter with 3-6 items and special announcements monthly in partnership with the IMI team to be distributed through IMI's My Emma platform and social media channels. On average, IMI issues 3-5 monthly announcements, releases 1-2 deliverables (fact sheets, reports, summary documents, slide decks), and hosts 3-5 special events annually.

- Maintain IMI's social media channels including X, LinkedIn, and Facebook, posting content weekly or bi-monthly.
- Develop media kits for 5-6 annual major releases designed for our governing and national advisory board, funders, project participants, and external partners to support their promotion of IMI deliverables, announcements, and events.
- Perform quarterly website maintenance and update IMI's website routinely using WordPress, including changes that reflect new deliverables, announcements, events, newsletters, etc.
- Develop 3-5 new pages with graphics for the website.
- Manage logins and passwords for multiple social media platforms (My Emma, LinkedIn, X, FB, and others).
- Minor design and editing of documents (e.g., editing text or changing a graphic in a document that has already been published and originally created by a graphic designer to update it).
- Oversee the maintenance and integrity of IMI's brand, including reviewing requests from external partners/organizations to cite or use IMI's name, logo, or likeness.
- Maintain the communications guidance document for IMI's grant-funded project participants in partnership with the IMI project teams. This includes enforcing and providing guidance on how project participants a) articulate their role on our projects, b) acknowledge funders, c) use consistent language that IMI has adopted about the project, d) use logos and/or materials produced as part of the project, and e) how to cite public facing IMI resources. An example of our communications guidance document is available upon request.

### *Project Management & Product Development*

- Manage the creation, development, workflow, distribution, and maintenance of all electronic and print collateral to ensure alignment with IMI's design, branding, and language guidance along with IMI's overall strategy. IMI's design, branding, and language guidelines are available as pdf documents upon request.
- Update and maintain current versions of the brand and design guidelines for the organization. Work with IMI's internal DEI committee, to update and maintain the language guidelines.
- Maintain and update as needed IMI's collateral including letterhead, business cards, PowerPoint slide templates, memo templates, issue brief templates, report templates, etc.
- Work in partnership with IMI's development firm, English Hudson, to support their development and fundraising efforts. For example, draft, finalize, schedule and disseminate emails through My Emma and social media posts on LinkedIn, X and Facebook regarding IMI's annual end-of-year campaign.
- For non-grant funded deliverables, such as the development of a logo for our 10<sup>th</sup> anniversary celebration in 2025, manage and coordinate the contribution of graphic designers, copy editors, printers etc. in completing the deliverable. This also includes identifying and staying within budget, setting up the scope of work including timelines, tasks, activities, and deliverables, providing edits and feedback, working with the senior leadership team for guidance and review, setting expectations and holding accountable the contributions of others (e.g., graphic designers), and meeting deadlines.
- For grant funded deliverables, such as the development of a short video with highlights from an in-person event, manage and coordinate the contribution of videographers in completing the deliverable. This also includes working closely with the IMI grant funded project team to identify and stay within budget, clarifying and overseeing the scope of work including timelines, tasks, activities, and deliverables, providing edits and feedback, working with the senior leadership team for guidance and review, setting expectations and holding accountable the contributions of others (e.g., videographer), and meeting deadlines.
- Serve as the final approval, after executive approval, for all IMI deliverables, announcements, and products including reports, fact sheets, issue briefs, webinars, etc.
- Provide ongoing feedback and guidance on how to improve internal and external comms process policies and procedures to support efficiency and effectiveness.

## Strategic Communications

- Serve as a member of IMI's senior leadership team, participating in weekly 30-minute senior leadership team meetings and monthly 2-hour organizational development and business strategy meetings.
- Lead the development and implementation of short and long-term plans for IMI's strategic communications and branding in partnerships with the IMI senior leadership team, governing board, and governing board communications committee.
- Collaborate with senior leadership to develop IMI's annual communications and editorial calendar, content plan, and approval process.
- Leverage and incorporate social media routinely and strategically aligned with IMI's work to increase awareness of IMI leadership, announcements, deliverables, special events, and swag store.
- Provide communications strategy for IMI's development and fundraising efforts.
- Complete tasks associated with the quarterly governing board meetings, including a) developing a communications update (brief, bulleted list) for the executive director's memo to the board, b) providing talking points for governing board communications chair update to the board, and c) attendance at Governing Board meetings at IMI headquarters in Washington, D.C. or virtually.
- Support and advise the governing board communications committee and chair on drafting and finalizing agendas, objectives, meeting minutes, and supporting documents. Communicate the communications committee's activities to IMI's senior leadership team.
- Lead the strategy for projects and deliverables directed by the governing board for the Comms Committee. Currently, the Comms Committee is working on finalizing the pitch deck by the end of 2024, establishing a process for the new comms contractor to maintain and update the pitch deck, creating a training in 2025 for the governing board on how to use the pitch deck, and planning for the 10<sup>th</sup> anniversary event in 2025 in Washington, D.C.
- Lead strategies and tactics for utilizing social media (i.e., Facebook, Instagram, X, YouTube, etc.) for both marketing, branding, and development purposes.
- Utilize data-informed approaches for digital strategy, including the use of Google Analytics, paid advertising, web marketing (SEO and SEM), to expand virtual reach.
- Track engagement metrics to determine the success of IMI's marketing efforts and impact of work.
- Coordinate cross-promotion of IMI deliverables, announcements and events with governing and national advisory board, funders, project participants, and external partners.

## Your Response to Our Request

Please use the following format when preparing your response. Please limit the proposal to five pages, excluding attachments.

Section 1: Proposer information: company name, primary contact, email, phone, etc.

Section 2: Scope of work/description of services and approach to communications services. Describe how your firm will approach IMI's communication needs, including the planned use of any affiliated or associated firm personnel.

Section 3: Firm's qualifications: summary of previous similar work for a nonprofit organization. Detail your firm's experience in providing communications services to 501(c)3 organizations. Please note your commitment to working with mission-oriented organizations that focus on community voice and diversity, equity, inclusion, and justice.

#### Section 4: Attachments.

- Cost proposal: budget and narrative providing budget justification detailing the cost per month to provide the services outlined in this RFP over a 12-month period.
- Resumes: key personnel working on this contract.
- Professional references: three references for which proposer has performed similar work; include the current contact information for each.
- Other: proposers may include a brief sample of their work or other materials to demonstrate their capabilities to perform the services outlined in this RFP, not more than three additional pages.

#### Our Process

Please send your proposal to Anna Bonelli, Director of Operations and Strategic Business Development, by October 31<sup>st</sup>. We will review all proposals and send a confirmation email receipt. We may also elect to conduct interviews with our top candidate(s) before our selection. As part of our process, please note that IMI prioritizes the selection of vendors that are local to the D.C. area and represent small businesses that are women and/or BIPOC owned and/or led.

Upon notification of the selected firm and acceptance, IMI will work in partnership to orient and onboard.

As you prepare your proposal, if you have questions or need more information, please contact Anna Bonelli at [ABonelli@MedicaidInnovation.org](mailto:ABonelli@MedicaidInnovation.org).