

**Amendment 1
2024-CAM-03
1/26/2024**

A) The following changes have been made to the cover page:

**Procurement Team Leader: Austin Vella
RFP Issued: January 10, 2024
Questions Due: January 16, 2024
Answers to Questions Posted: January 18, 2024
Responses Due: January 31, 2024 by 5PM EST**

Has been modified to read:

**Procurement Team Leader: Austin Vella
RFP Issued: January 10, 2024
Questions Due: January 16, 2024
Answers to Questions Posted: January 26, 2024
Responses Due: February 8, 2024 by 5PM EST**

**B) The following changes have been made to Section 3.2 Application
Timeframe:**

Task	Date
RFP Released	January 9, 2004
Question Due	January 16, 2024 @5PM EST
Question and Answer File Posted	January 18, 2024 @ 5 PM EST
Applications Due	January 31, 2024 @ 5 PM EST

Has been modified to read:

Task	Date
RFP Released	January 9, 2004
Question Due	January 16, 2024 @5PM EST
Question and Answer File Posted	January, 26 2024 @ 5 PM EST
Applications Due	February 8, 2024 @ 5 PM EST

C) The following changes have been made to Section 3.3 Questions:

Questions regarding this RFP must be submitted by electronic mail to proposals@masstech.org with the following Subject Line: "Questions – RFP No. 2024-CAM-03". All questions must be received by 5:00 p.m. EST on January 16, 2024. Responses to all questions received will be posted on or before 5:00p.m. on January 18, 2024 to Mass Tech Collaborative and COMMBUYS website(s).

Has been modified to read:

Questions regarding this RFP must be submitted by electronic mail to proposals@masstech.org with the following Subject Line: "Questions – RFP No. 2024-CAM-03". All questions must be received by 5:00 p.m. EST on January 16, 2024. Responses to all questions received will be posted on or before 5:00p.m. on **January 26, 2024** to Mass Tech Collaborative and COMMBUYS website(s).



Request for Proposals for Marketing Engagement for Advanced Manufacturing

RFP No. 2024-CAM-03

**Massachusetts Technology Collaborative
75 North Drive
Westborough, MA 01581-3340
<http://www.masstech.org>**

Procurement Team Leader: Austin Vella

RFP Issued:	January 10, 2024
Questions Due:	January 16, 2024
Answers to Questions Posted:	January 26, 2024
Responses Due:	*****: YVfi Ufm8, 2024 by 5PM EST

1. INTRODUCTION

1.1 Overview

Massachusetts Technology Collaborative (“Mass Tech Collaborative” or “MassTech”) is issuing this Request for Proposals for **the Marketing Engagement for Advanced Manufacturing** (RFP No.2024-CAM-03) (the “RFP”) to solicit responses from qualified contractors (“Respondents”) with experience in developing and executing a traditional and digital marketing campaign to raise awareness for the advanced manufacturing sector. Respondents will be competing against each other for selection to provide the services set forth herein (the “Services”). The submissions of all Respondents shall be compared and evaluated pursuant to the evaluation criteria set forth in this RFP, and a single Respondent may be selected.

Mass Tech Collaborative will enter into a **Services Agreement and Statement of Work** with selected Respondents containing certain standard provisions (the “Agreement”), located [HERE](#).

1.2 Mass Tech Collaborative

Mass Tech Collaborative is an independent public instrumentality of the Commonwealth of Massachusetts chartered by the Commonwealth to serve as a catalyst for growing its innovation economy. Mass Tech Collaborative brings together leaders from industry, academia, and government to advance technology-focused solutions that lead to economic growth, job creation, and public benefits in Massachusetts. Mass Tech Collaborative has six primary divisions: Innovation Institute, Massachusetts Broadband Institute, Massachusetts CyberCenter, Center for Advanced Manufacturing, NEMC Hub, and Massachusetts e-Health Institute. For additional information about Mass Tech Collaborative and its programs and initiatives, please visit our website at www.masstech.org.

2. SERVICES REQUIRED

2.1 Overview

The Center for Advanced Manufacturing’s (“CAM”), mission is to foster the most complete, most connected, and fastest manufacturing ecosystem from innovation through production. CAM seeks to engage a marketing firm to plan, develop and execute traditional and digital marketing campaigns to raise awareness of advanced manufacturing in the Commonwealth and to draw attention and enrollment into advanced manufacturing training through vocational technical schools, Innovation Pathways, adult education programs, and at our community colleges. The marketing will be built off a brand that highlights manufacturing as no longer dark, dirty and dangerous but modern, creative, high-tech and accessible. .

2.2 Scope of Services

The scope of work under this procurement is to expand upon the marketing plan that has been running for the past two years and execute statewide campaigns that promote manufacturing as an exciting career choice, and drive enrollment in manufacturing training programs in Massachusetts. The statewide multichannel marketing campaign should have a higher focus on Gateway Cities and targeted geographical areas to be determined in collaboration with CAM. The scope of work includes the following requirements:

- Manage and drive paid search marketing, including pay per click (PPC) and display ads, to exceed industry benchmarks and to increase website traffic, click-through rates, and conversion rates leading to enrollment in courses and trainings

- Develop a monthly high-level marketing plan (“Roadmap”) to meet expected outcomes with specific tactics to meet target audiences
- Participate in presentations to state partners on marketing strategy and marketing data analytics
- Drive traffic to MassMakes.org and recommend data-driven updates to the MassMakes website
- Leverage and evolve existing marketing assets (including but not limited to: images, digital audio spots, video content, website content and messaging)
- Provide technical assistance to Career Technical initiatives (CTI), Advanced Manufacturing Training Grant providers, and Community College programs on marketing and outreach development (flyers, billboards, etc.) and co-branding
- Target marketing to help fill training seats at open manufacturing training programs
- Develop and execute vibrant, exciting, creative multi-pronged campaigns (print, digital, radio, podcasts, social media) promoting advanced manufacturing courses, trainings, and career paths
- Map training offerings across the state to identify gaps (for use in strategic planning), and update the MassMakes.org website with MassTech’s Communications team
- Assist CAM with development of a “Prospect Lead” process
- Participate in two Community of Practice (COP) and/or strategic planning meetings during year (to understand current training system challenges and to present system improvements)
- Provide support and recommendations for in-house marketing and communications team
- Establish a metrics dashboard and tracking against expected outcomes with monthly reports to drive decision making and results

The selected respondent is expected to interact with CAM and MassTech staff to gain a better understanding of MassTech’s perspective, priorities and actions already underway. This interaction with CAM/MassTech will assist in providing additional context and will help to inform the selected respondent’s plan.

2.3 Timeline and Deliverables

Deliverables include:

1) Development of a high-level marketing plan (“Roadmap”). The Roadmap shall be provided in a high-level presentation format (e.g. PowerPoint) and be supplemented with more details upon request. The Roadmap will be reviewed by CAM and MassTech and then revised by selected respondent. The final version of the Roadmap is expected to be completed within one month from effective date of the services agreement.

2) The final version of all marketing campaign assets (print, digital, radio, podcasts, social media) promoting advanced manufacturing as a career choice throughout the state.

3) Monthly metric dashboard and project status updates.

4) A marketing/prospect lead playbook that includes prospect lead email templates, flyers and marketing templates (collateral for co-branding), marketing and branding best practices.

Timeline:

Marketing assets (such as graphics, images, radio/podcast copy, and social media posts, LookUp Tables (“LUTS”), and Lightroom presets) and campaigns will be started in parallel with the finalization of the Roadmap work during the initial month of the engagement, with additional assets being created and delivered throughout the engagement to support the various marketing campaigns. All marketing assets must be provided to and approved by MassTech in advance of use in a campaign.

Multi-pronged marketing campaigns will run through December 2024. Iterative optimization of campaigns is required throughout the duration of the contract, and will be reviewed with CAM at least monthly, and upon request.

2.4 Cost and Budget

MassTech is seeking a time and materials not-to-exceed cost Proposal that utilizes the Budget Template (Attachment C).

The budget should break out the costs for the initial development of the Roadmap and the marketing assets and also provide monthly costs for the execution phase of the marketing campaign including a month of a soft launch and 9 months (assume April-December) of full campaign execution including the direct costs for all proposed campaigns.

The projected staff and number of hours for both the development and execution phase should be included on the Budget Template sheet. The budget template also provides a sheet for listing other staff that may be working on this engagement along with their hourly rates.

The total proposal should not exceed \$375,000.00. MassTech reserves the right to contract for less than this amount or to modify the scope of the work through this procurement process.

3 APPLICATION PROCESS

3.1 Application and Submission Instructions

Respondents are cautioned to read this RFP carefully and to conform to its requirements. Failure to comply with the requirements of this RFP may serve as grounds for rejection of an Application.

a. Required Submissions- All Applications must include the items listed below:

- Application Cover Sheet (Attachment A)
- Application, which shall include:
 - A description of the firm responding to the RFP (including descriptions of proposed subcontractors, if any) and the firm’s qualifications to perform the Services that specifically address evaluation criteria considerations.
 - The proposed approach to providing the Services. Additionally, Respondents are invited to propose alternative(s) which provide substantially better or more cost-effective performance than achievable under the stated RFP scope of services.

- Provide the total not-to-exceed costs for providing the Services based on projected hours, proposed hourly rates, as well as any other appropriate direct costs, in the Excel Budget Template ([Attachment C](#)). List additional fees, overhead charges, or reimbursable expenses, if any. As a general policy, the Mass Tech Collaborative does not pay mark-ups on reimbursables or out-of-pocket expenses.
 - Three references for work previously performed by the Respondent that is substantially similar to the Services. References should include a contact person, address and phone number.
 - Authorized Application Signature and Acceptance Form ([Attachment B](#)). **By executing the Authorized Respondent's Signature and Acceptance Form and submitting a response to this RFP, Respondents certify that they (1) are in compliance with the terms, conditions and specifications contained in this RFP, (2) acknowledge and understand the procedures for handling materials submitted to the Mass Tech Collaborative as set forth in subsection c. below, (3) agree to be bound by those procedures, and (4) agree that the Mass Tech Collaborative shall not be liable under any circumstances for the disclosure of any materials submitted to the Mass Tech Collaborative pursuant to this RFP or upon the Respondent's selection.**
 - Respondent's W9
 - Exceptions to the *Services Agreement and Statement of Work*, located at [HERE](#), if any.
- b. Applications **must** be **submitted to** proposals@masstech.org (please include the RFP number in the subject heading).
- c. Any and all responses, applications, data, materials, information and documentation submitted to Mass Tech Collaborative in response to this RFP shall become Mass Tech Collaborative's property and shall be subject to public disclosure. As a public entity, the Mass Tech Collaborative is subject to the Massachusetts Public Records Law (set forth at Massachusetts General Laws Chapter 66). There are very limited and narrow exceptions to disclosure under the Public Records Law. If a Respondent wishes to have the Mass Tech Collaborative treat certain information or documentation as confidential, the Respondent must submit a written request to the Mass Tech Collaborative's General Counsel's office no later than 5:00 p.m. five (5) business days prior to the required date of Application submission set forth in Section 3.2 below. The request must precisely identify the information and/or documentation that is the subject of the request and provide a detailed explanation supporting the application of the statutory exemption(s) from the public records cited by the Respondent. The General Counsel will issue a written determination within ten (10) business days of receipt of the written request. If the General Counsel approves the request, the Respondent shall clearly label the relevant information and/or documentation as "**CONFIDENTIAL**" in the Application and **shall only include the confidential material in the hard copy of the Application**. Any statements in an Application reserving any confidentiality or privacy rights that is inconsistent with these requirements and procedures will be disregarded.

3.2 Application Timeframe

The application process will proceed according to the following schedule. The target dates are subject to change. Therefore, Respondents are encouraged to check Mass Tech Collaborative’s website frequently for updates to the schedule.

Task	Date:
RFP Released	January 9, 2024
Questions Due	January 16, 2024 @ 5 PM EST
Question and Answer File Posted	January 16, 2024 @ 5 PM EST
Applications Due	January 26, 2024 @ 5 PM EST

3.3 Questions

Questions regarding this RFP must be submitted by electronic mail to proposals@masstech.org with the following Subject Line: “Questions – RFP No. 2024-CAM-03”). All questions must be received by 5:00 p.m. EST on January 16, 2024. Responses to all questions received will be posted on or before 5:00 p.m. on January 26, 2024 to Mass Tech Collaborative and COMMBUYS website(s).

4 EVALUATION PROCESS AND CRITERIA

4.1 Process

The Mass Tech Collaborative shall evaluate each Application that is properly submitted. As part of the selection process, Mass Tech Collaborative may invite finalists to answer questions regarding their Application in person or in writing. In its sole discretion, Mass Tech Collaborative may also choose to enter into a negotiation period with one or more finalist Respondent(s) and then ask the Respondent(s) to submit a best and final offer.

4.2 Criteria

Selection of a Respondent to provide the services sought herein may be based on criteria that include but are not limited to:

- Experience in establishing and deploying state-wide marketing initiatives, as evidenced by three case studies of past work.
- Experience in creating and managing multi-channel marketing approaches to drive awareness and engagement with the ability to pivot based upon outcomes.
- Experience working with manufacturing, education, and/or state agencies.
- Marketing Campaign proposal.
 - The reasonableness of the budget and the amount of funds designated for the marketing campaigns.
 - Ability to launch in a short time frame.
 - Capable of digital plus traditional marketing approaches.
- Preference for women, minority, and veteran owned businesses.

Lack of debarment status by either the state or federal government is also required.

The order of these factors does not generally denote relative importance. The goal of this RFP is to select and enter into an Agreement with the Respondent that will provide the best value for the Services to achieve MassTech Collaborative's goals. Mass Tech Collaborative reserves the right to consider such other relevant factors as it deems appropriate in order to obtain the "best value".

5.0 GENERAL CONDITIONS

5.1 General Information

- a) If an Application fails to meet any material terms, conditions, requirements or procedures, it may be deemed unresponsive and disqualified. The Mass Tech Collaborative reserves the right to waive omissions or irregularities that it determines to be not material.
- b) This RFP, as may be amended from time to time by Mass Tech Collaborative, does not commit Mass Tech Collaborative to select any firm(s), award any contracts for services pursuant to this RFP, or pay any costs incurred in responding to this RFP. Mass Tech Collaborative reserves the right, in its sole discretion, to withdraw the RFP, to engage in preliminary discussions with prospective Respondents, to accept or reject any or all Applications received, to request supplemental or clarifying information, to negotiate with any or all qualified Respondents, and to request modifications to Applications in accordance with negotiations, all to the same extent as if this were a Request for Information.
- c) On matters related solely to this RFP that arise prior to an award decision by the Mass Tech Collaborative, Respondents shall limit communications with the Mass Tech Collaborative to the Procurement Team Leader and such other individuals as the Mass Tech Collaborative may designate from time to time. No other Mass Tech Collaborative employee or representative is authorized to provide any information or respond to any questions or inquiries concerning this RFP. Respondents may contact the Procurement Team Leader for this RFP in the event this RFP is incomplete.
- d) The Mass Tech Collaborative may provide reasonable accommodations, including the provision of materials in an alternative format, for Respondents with disabilities or other hardships. Respondents requiring accommodations shall submit requests in writing, with supporting documentation justifying the accommodations, to the Procurement Team Leader. The Mass Tech Collaborative reserves the right to grant or reject any request for accommodations.
- e) Respondent's Application shall be treated by the Mass Tech Collaborative as an accurate statement of Respondent's capabilities and experience. Should any statement asserted by Respondent prove to be inaccurate or inconsistent with the foregoing, such inaccuracy or inconsistency shall constitute sufficient cause for Mass Tech Collaborative in its sole discretion to reject the Application and/or terminate of any resulting Agreement.
- f) Costs that are not specifically identified in the Respondent's response and/or not specifically accepted by Mass Tech Collaborative as part of the Agreement will not be compensated under any contract awarded pursuant to this RFP.
- g) Mass Tech Collaborative's prior approval is required for any subcontracted services under any Agreement entered into as a result of this RFP. The selected Respondent will take all appropriate steps to assure that minority firms, women's business enterprises, and labor surplus area firms are used when possible. The selected Respondent is responsible for the satisfactory performance and adequate oversight of its subcontractors. Subcontractors are required to meet the same requirements and are held to the same reimbursable cost standards as the selected Respondent.

- h) Submitted responses must be valid in all respects for a minimum period of sixty (60) days after the deadline for submission.
- i) Mass Tech Collaborative reserves the right to amend the Agreement at any time prior to execution. Respondents should review the Agreement as they are required to specify any exceptions to the Agreement and to make any suggested counterproposal in their Application. A failure to specify exceptions and/or counterproposals will be deemed an acceptance of the Agreement's general terms and conditions, and no subsequent negotiation of such provisions shall be permitted.

5.2 Posting of Modifications/Addenda to RFP

This RFP has been distributed electronically using the Mass Tech Collaborative and COMMBUYS websites. If the Mass Tech Collaborative determines that it is necessary to revise any part of this RFP, or if additional data is necessary to clarify any of its provisions, an addendum will be posted to the websites. It is the responsibility of each potential Respondent to check the Mass Tech Collaborative and COMMBUYS websites for any addenda or modifications to the RFP. The Mass Tech Collaborative accepts no liability and will provide no accommodation to Respondents who submit a response based on an out-of-date RFP.

Attachment A
Application Cover Sheet

Name of Respondent			
Proposal Amount			
Mailing Address	City/Town	State	Zip Code
Telephone	Fax	Web Address	
Primary Contact for Clarification		Primary Contact E-mail Address	
Authorized Signatory		Authorized Signatory E-mail Address	
Legal Status/Jurisdiction (e.g., a Massachusetts Corporation, LLC, LLP, etc.)		Respondents UEI No.	

Attachment B
Massachusetts Technology Collaborative
Authorized Respondent's Signature and Acceptance Form

The undersigned is a duly authorized representative of the Respondent listed below. The Respondent has read and understands the RFP requirements. The Respondent acknowledges that all of the terms and conditions of the RFP are mandatory, and that Respondent's response is compliant with such requirements.

The Respondent understands that, if selected by the Mass Tech Collaborative, the Respondent and the Mass Tech Collaborative will execute an Agreement specifying the mutual requirements of participation. The undersigned has either (*please check one*):

- specified exceptions and counter-proposals to the terms and conditions of the [Services Agreement](#); or
- agrees to the terms and conditions set forth therein;

The undersigned acknowledges and agrees that the failure to submit exceptions and counter-proposals with this response shall be deemed a waiver, and the Agreement shall not be subject to further negotiation.

Respondent agrees that the entire bid response will remain valid for sixty (60) days from receipt by the Mass Tech Collaborative.

I certify that Respondent is in compliance with all corporate filing requirements and State tax laws.

I further certify that the statements made in this response to the RFP, including all attachments and exhibits, are true and correct to the best of my knowledge.

Respondent: _____
(Printed Name of Respondent)

By: _____
(Signature of Authorized Representative)

Name: _____

Title: _____

Date: _____

Attachment C
Budget Template

SEE EXCEL SPREADSHEET