



REQUEST FOR PROPOSALS (RFP)

**NATIONAL BENEFITS HELPLINE AND
SCREENING SERVICE**

ISSUED BY:

The National Council on Aging's Center for Benefits Access

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INTRODUCTION

The National Council on Aging (NCOA) is a respected national leader and trusted partner to help people aged 60+ meet the challenges of aging. Our mission is to improve the lives of millions of older adults, especially those who are struggling. Through innovative community programs and services, online help, and advocacy, NCOA is partnering with nonprofit organizations, government, and business to improve the health and economic security of 40 million older adults by 2030.

Within NCOA, the Center for Benefits Access (the Center) helps organizations enroll seniors and younger adults with disabilities with limited means into the benefits programs for which they are eligible so that they can remain healthy and improve the quality of their lives. The Center accomplishes its mission by:

- Providing tools and resources that help local, state, and regional organizations to find, counsel, and assist seniors and younger adults with disabilities to apply for and enroll in the benefits for which they may be eligible.
- Generating and disseminating new knowledge about best practices and cost-effective strategies for benefits outreach and enrollment.

The Center serves as the Medicare Improvements for Patients and Providers Act (MIPPA) Resource Center supported by the U.S. Administration for Community Living (ACL). The Center also manages the Senior SNAP Enrollment Initiative, an effort funded by the Walmart Foundation to increase older adult enrollment into the Supplemental Nutrition Assistance Program (SNAP). More information about the Center can be found at www.ncoa.org/centerforbenefits.

PROJECT BACKGROUND

For nearly 20 years, NCOA's free screening tool, BenefitsCheckUp® (www.BenefitsCheckUp.org), has offered a way for people to go online at their convenience and see whether they or a loved one/client may qualify for programs that can help pay for medicine, food, household utilities, and more. BenefitsCheckUp includes more than 2,000 public and private benefits programs from all 50 states and the District of Columbia. Since 2001, more than 9 million people have used the tool to identify benefits valued at more than \$37 billion. A Spanish translation of the tool was recently launched at www.buscabeneficios.org.

BenefitsCheckUp was created with an awareness that older adults and their caregivers are becoming increasingly digitally savvy. An estimated 67% of adults aged 65+ use the internet, and 4 in 10 own smartphones.¹ Yet despite these trends, NCOA recognizes that a subset of the older population remains uncomfortable with online tools and services. While BenefitsCheckUp

¹ Pew Research Center, <https://www.pewresearch.org/internet/2017/05/17/tech-adoption-climbs-among-older-adults/>

has an online chat feature, many older adults prefer telephonic or in-person assistance from a trusted advisor.

NCOA's network of Benefits Enrollment Centers (BECs)—now numbering 80 in 40 states—work to bridge the digital divide by serving as community resources for those seeking help applying for benefits. BECs provide person-centered assistance to assist low-income older adults and persons with disabilities to screen for and enroll in all the programs they may be eligible for, and work to create seamless systems of benefits access in their communities.

However, the NCOA BEC network does not cover all states and communities. While some BECs operate statewide, many others serve a smaller region within their state, or focus on a specific underserved population. The National Benefits Helpline and Screening Service—for which this RFP was created—aims to fill this gap.

REQUIREMENTS AND SCOPE OF WORK

NCOA's Center for Benefits Access seeks to award one contract to a qualified vendor (referred to throughout this RFP as "helpline contractor" or "vendor") for a 23-month period (February 1, 2021 to December 31, 2022) to run a National Benefits Helpline and Screening Service.

The focus of this contract is to supplement the assistance offered through NCOA's online consumer screening tool, BenefitsCheckUp, and network of Benefits Enrollment Centers by providing a national, toll-free helpline to provide older adults and caregivers with benefits information, referrals, and screening.

The helpline will utilize a call center approach to provide callers with two tiers of assistance:

- Information about benefits, the BenefitsCheckUp tool, and (as appropriate) referrals to local human service agencies
- BenefitsCheckUp® screening assistance, with a personalized report and benefits application information sent to callers who opt to receive this service.

Call Center Requirements

The selected helpline contractor must be able to meet the following requirements related to operating a call center:

- Operate a toll-free call center during NCOA's normal business hours, 9 am to 5 pm ET.
- Provide after-hours messages for those dialing outside of these call center hours of operation.
- Answer all calls as if the caller was phoning NCOA/BenefitsCheckUp directly; a specific phone number will be established for sole use with the helpline.
- Offer same-day assistance to Spanish-speaking clients through a bilingual call representative or language line service. While we do not anticipate a high volume of Spanish callers, there should be some way of accommodating these calls.
- Have a system to ensure quality control of calls, and provide corrective action where

warranted.

- Offer a mechanism for callers to help evaluate satisfaction with the call center experience (e.g., post-call survey, emailed survey, etc.).

Service Expectations

The vendor must offer two tiers of service to callers, triaging individuals based on their expressed needs:

- **Information & Referral:** The vendor will ascertain the nature of each call, provide information about benefits/social services and using the BenefitsCheckUp tool, and, as appropriate, offer referrals to other relevant agencies, e.g., the state SNAP hotline, local Social Security office, BEC (if the caller is in the catchment area), Area Agencies on Aging (AAA), Aging and Disability Resource Centers (ADRCs), and State Health Insurance Assistance Programs (SHIPs), among others.
- **Screening Assistance:** The vendor will provide callers an opportunity to be guided through the BenefitsCheckUp screening tool, either at the time of call or later via a scheduled appointment. Once completing the screening with a caller, the vendor will consolidate a “package” (either digital or physical) of the application forms and fact sheets (with relevant application submission details) about the benefits the individual screened eligible for, to be sent to the caller via email/USPS. The vendor will have a mechanism in place to follow up with and encourage the caller to submit the application(s).

Given the wide variety of programs included in the BenefitsCheckUp database, we expect the primary focus of the screening assistance to focus on one or more of the five core benefits:

- Medicare Part D Extra Help (or Low-Income Subsidy, LIS)
- Medicare Savings Programs (MSP)
- Medicaid
- Supplemental Nutrition Assistance Program (SNAP, formerly Food Stamps)
- Low-Income Home Energy Assistance Program (LIHEAP)

Along with these tasks, it is expected that the helpline contractor will:

- Employ human-centered design to create an emotionally connected, empathic experience for callers. Older adults (and their caregivers) often call NCOA in the midst of a financial crisis, and many have myriad needs beyond accessing a benefit program. The vendor should focus on listening to the caller’s concerns, and responding with sensitivity to determine and assist with their immediate needs.
- Apply broad knowledge of available human/social services to establish an appropriate referral tree, using an existing reference database or one created for this project.
- Possess (or have a plan to acquire) knowledge about the core benefits listed above, and train staff in the basics of these programs for screening purposes.

Data Collection

The helpline contractor will be required to provide monthly reports to NCOA regarding the number and nature of calls as well as screenings conducted. As such, the vendor must:

- Have a secure system in place for collecting key information about callers and the nature of the calls (see data points below).
- Develop a mechanism to schedule BenefitsCheckUp screening appointments for callers that express an interest.
- Have a method of following up with individuals that complete a screening to gauge whether they received their application information and to send follow-up reminders to encourage them to apply for benefits.

The data elements below are preliminary guidelines for expected minimum data collected. NCOA reserves the right to change the data elements required in the monthly report at any point during the grant period (in consultation with the vendor). Upon contract award, NCOA will work with the vendor to refine these:

- Number of callers to helpline (daily/weekly)
- Geographic distribution of calls (at state level)
- Call topic (NCOA will work with vendor to define broad categories)
- Outcome of call (e.g., referral, question answered, screening scheduled)
- Number of callers who request and receive an appointment for BenefitsCheckUp screening
 - Key demographics of individuals receiving screening, such as age, veteran and disability status, race, income
- Core benefits identified during screening and what information was mailed to caller
- Type and outcome of follow-up conducted (email, phone call)

Monthly reporting data will be due to NCOA no later than the 15th of the following month. These elements do not include additional open-ended questions that will be addressed in the project interim and final reports.

Additionally, the contractor will be required to submit an interim narrative report at the end of the first calendar year of the helpline implementation, and final report at the end of the grant period.

While NCOA will expect the vendor to collect and submit aggregate data on the number and type of interactions involved with the helpline, our emphasis is on ensuring the quality of those interactions over the quantity of those served—callers should not feel rushed and each caller should receive the same attention to service.

Project Oversight

NCOA will provide overall direction for the project to assist the vendor in ensuring the quality and value of the helpline to callers.

The helpline contractor will be expected to:

- Designate a staff member to serve as the coordinator and primary contact working with NCOA on implementation and evaluation of the project.
- Respond in a timely manner (within 1 business day) to NCOA inquiries and requests via email or telephone.
- Work with NCOA to explore additional ways to follow up with callers and connect them to additional relevant programs and services from NCOA (e.g., chronic disease self-management education, aging mastery workshops).
- Participate in any evaluation efforts of the helpline led by NCOA.

GENERAL CONDITIONS

Information –Confidentiality

All bid responses will be treated as confidential by NCOA. Bidding vendors must understand and agree that all records, data, and documentation associated with NCOA are considered proprietary and confidential. The contents of this and attached documents and information shall also be considered equally confidential.

Compliance

The response shall include a complete solution with respect to the requirements. NCOA reserves the right to accept or reject any or all bid options, to make exceptions to these RFP specifications, or to waive any formalities. Please note explicitly in each of the proposal sections if you cannot meet the requirements within your line of business or through business partners.

Contract Award

NCOA reserves the right to award a contract based solely on the proposal or to negotiate with the vendor. Issuance of this RFP, preparation, submission, and evaluation of vendor response does not commit NCOA to award a contract to the vendor. Only a written contract will obligate NCOA to the vendor services.

Notification of Results

A NCOA employee or agent will notify all vendors who submit proposals in response to this RFP of the results of the selection process.

Price Guarantees

All pricing in the bid response must be valid for a minimum of 90 days. If a bidding company is planning a pricing change within this 90-day window, NCOA must be provided and guaranteed the lower price.

Adjustments to Requirements

NCOA reserves the right to add, delete, relocate, and modify services and requirements as necessary.

Use of Grant Funds

All funds provided to successful applicants under this grant program are federal funds from the U.S. Department of Health and Human Services Administration for Community Living. As such, all current federal rules apply and must be adhered to by grantees. The full grants policy can be found here: <http://www.hhs.gov/sites/default/files/grants/grants/policies-regulations/hhsgps107.pdf>

SUBMISSION FORMAT AND CONTENT

Proposal Requirements and Evaluation

Each submission should include the following elements:

- Description of approach and how your organization will complete the work requirements outlined in pages 4-6
- Organizational experience and capacity
- Budget and budget narrative

NCOA has developed robust evaluation criteria to ensure that the selected vendor and proposal meets the desired business and technical requirements. Each proposal will be scored up to a total of 100 points. These scores will provide a primary, but not exclusive, basis for determining final approval. Attachment A provides a breakdown of the scoring and an overview of the information the bidder should seek to include in each section of the proposal.

Selection Criteria

In assessing the quality of each proposal submitted, the Center will consider:

- The organizational approach and ability to meet all of the work requirements outlined in this RFP;
- Prior experience operating a call center/helpline telephonic system;
- Successful track record working with seniors and/or adults living with disabilities, especially with low-income audiences;
- Demonstrated understanding of the technical capacity and resources necessary to carry out the project;
- Demonstrated experience in utilizing human-centered design to offer empathic telephone assistance;
- Familiarity with BenefitsCheckUp (www.benefitscheckup.org) and broad knowledge of the landscape of benefits and social services available to those struggling with economic insecurity;
- Plans for assisting individuals at both levels of helpline service (information and referral, and screening);
- Willingness to test the visibility of the helpline with NCOA (should call volume fall below expectations);
- Commitment to collect data and provide monthly reports to NCOA; and

- Commitment to participate in any evaluation of the project.

NCOA reserves the right to request additional information from the bidder in reviewing the selection criteria and to consider any other criteria, which the evaluation team considers relevant. In addition, NCOA reserves the right to disqualify any vendor if it deems that a critical or major solution component is missing from the proposal.

Submission Format

All proposals must be submitted via email to Brandy Bauer, Associate Director of the Center for Benefits Access, at brandy.bauer@ncoa.org by **Monday, January 4, 2021 at 5 pm EST**. (Due to pandemic office closures, we cannot accept physical submission of proposals.) NCOA will not accept any materials submitted late, and we will not be able to review incomplete proposals.

Applicants who intend to apply for this solicitation are encouraged to email Brandy Bauer in advance of the proposal deadline to receive RFP-related updates.

Any questions about this RFP can be directed to brandy.bauer@ncoa.org. All applicants who have indicated their intention to apply will receive copies of responses to all questions posed in regard to this RFP.

NCOA will enter negotiations with the successful applicant selected to receive this contract by February 1, 2021. All applicants will receive confirmation of their submission and a follow-up email regarding the award notification.

ATTACHMENT A – OUTLINE OF PROPOSAL ELEMENTS AND QUESTIONS TO ADDRESS

Plan timeframe

February 1, 2021 through December 31, 2022

1. Applicant information:

Organization Name

Key Contact for this Proposal

Street Address

City/State /Zip

Telephone

E-mail

*Website

*Organizational Facebook, Twitter, and/or LinkedIn

Has agency applied for/received funding from NCOA in the past 5 years? Please list previous programs.

2. Description of Approach [40 points]

Describe in detail how your organization will meet the requirements outline in pages 4-6 of this RFP.

- a. What is the general approach to implementing the benefits helpline?
- b. How will your organization manage the two levels of service required (information and referral and screening service)?
- c. Describe your experience with human-centered design. How will you ensure callers receive high quality, empathic assistance?
- d. What current telephonic services do you provide? How will the knowledge/experience pertaining to senior services/benefits/health and human services be integrated or transferred to the benefits helpline?
- e. Describe your organization's familiarity or experience with benefits and other supportive services for low-income Medicare beneficiaries. Have you worked previously to offer information and/or screening related to the five core benefits (SNAP, LIS, MSP, Medicaid, and LIHEAP)? Are you comfortable using the BenefitsCheckUp screening tool?
- f. Describe how you will track your agency's work. What data management tools do you currently use to track clients? How will you handle scheduling appointments for BenefitsCheckUp screenings?
- g. How do you intend to follow up with clients who have received a screening?
- h. Explain your quality control process, and how you intend to measure/evaluate the effectiveness and success of your efforts.
- i. Provide a brief overview of the timeline for implementing key activities.

3. Organizational Experience and Capacity [35 points]

- a. Why is your organization applying for this project? How does the benefits helpline fit in with your mission and objectives?
- b. What is your current capacity for doing this type of work? Does the ongoing pandemic have any effect on your capacity to provide these services remotely, if needed?
- c. Describe prior experience operating a toll-free helpline. (Include, as relevant, information about answering as another organization and offering multilingual services.)
- d. Describe your experience with applying human-centered design or empathy training to services offered by your organization staff.
- e. Identify the Project Director, describe relevant experience, and identify time commitment to this project. **This role cannot be filled by executive level staff.**
- f. Identify other key staff, relevant experience, and time commitment. Provide resumes for key personnel in an attachment/appendix to the proposal.
- g. Describe your organization's other key funding sources. Will any of those resources be leveraged to implement the helpline?

4. Budget and Budget Narrative [25 points]

- a. Provide a complete budget for the 23-month project, including labor, fringe, direct, and indirect costs.
- b. Provide narrative justification for each item that explains your calculations and assumptions.