



REQUEST FOR PROPOSALS (RFP)

GRANT INVITATION AND APPLICATION INSTRUCTIONS

ISSUED BY:

The National Council on Aging's Center for Benefits Access

Released January 22, 2018

Funding Opportunity Title: Facebook Ad Grants

Grant Interest Area: The focus of this grant is to provide funding and technical assistance to Medicare Improvements for Patients and Providers Act (MIPPA) grantees who will implement a Facebook ad campaign promoting core benefits to Medicare beneficiaries who may be eligible for but missing out on them.

Key Dates: **Optional Notice of Intent due Friday, Feb. 2, 2018 at 12 p.m. EST**
 Application due Wednesday, Feb. 14, 2018 at 5 p.m. EST

Funding Opportunity Description

The Center for Benefits Access (the Center) at the National Council on Aging (NCOA) seeks applicants for grants to support benefits outreach using paid digital advertising on Facebook. Up to ten (10) grants of \$10,000 each will be awarded to successful applicants to run the campaign over a six-month period, running March through August 2018. Grantees will receive technical assistance and support to develop, implement, and report on their Facebook ad campaign.

About the Center

Funded by the U.S. Department of Health and Human Services Administration for Community Living (ACL), the Center for Benefits Access:

- Serves as the Medicare Improvements for Patients and Providers Act (MIPPA) resource center for states, territories, and the District of Columbia that receive MIPPA funding, providing training, collecting data, and disseminating information and best practices to grantees
- Funds and establishes Benefits Enrollment Centers (BECs) throughout the country
- Fosters the use of cost-effective benefits outreach and enrollment strategies by BECs and others in the aging and disability services provider networks to find and enroll Medicare beneficiaries with limited means into public benefits
- Promotes the use of web-based decision support, screening, and enrollment tools among the aging and disability services networks, consumers, families, and caregivers
- Maintains, updates, and enhances the usability of current benefits screening and enrollment systems
- Provides training and technical assistance to BECs and to the larger aging and disability networks regarding cost-effective strategies, promising practices, and other topics related to benefits outreach and enrollment
- Maintains an online information clearinghouse of promising practices related to benefits outreach and enrollment.

More information about the Center can be found at www.ncoa.org/centerforbenefits.

About NCOA

The National Council on Aging (NCOA) is a respected national leader and trusted partner which helps 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 10 million older adults by 2020. Learn more at ncoa.org.

About the Facebook Ad Campaign

Millions of low-income Medicare beneficiaries are eligible for, but not enrolled in, benefits that can help pay for prescriptions, health care, food, and more. Lack of awareness of these programs, stigma, uncertainty about the application process, and mistaken beliefs about who's eligible for benefits all factor into why many seniors and younger adults with disabilities are missing out on these financial supports.

In 2016-2017, NCOA worked with M+R/Perry Udem to conduct a national survey of low-income older adults to determine what messages work best to encourage individuals to apply for benefits. The results of this research were [published online](#) and informed a pilot campaign that tested several strategies to reach this population:

- Earned media
- Paid Facebook ads
- Radio public service announcements (PSAs)
- Telephone town halls

An [outreach toolkit](#) explains each of these strategies in more depth.

Feedback from the participating six pilot sites revealed that Facebook ads were an efficient, cost-effective way to reach many low-income Medicare beneficiaries potentially eligible for but not enrolled in benefits.

How the MIPPA Facebook ad campaign works

Facebook ads typically appear in a user's news feed. For this campaign, the ads—which convey a message about how benefits can help those on a fixed income—will link to a branded data form to collect basic information about the respondent (e.g. name, age, phone number, email, zip code). Once completed, grantees will use the information collected on the forms to follow up with leads--anyone who submits a completed form--to screen and provide application assistance for benefits enrollment.

(See more about this process in the [Facebook ad toolkit](#).)

Eligibility and Selection Criteria

Organizations eligible to apply for this grant must be one of the following:

- A Benefits Enrollment Center (BEC) currently supported by NCOA's Center for Benefits Access
OR
- A state or local aging agency that receives money from the state to conduct benefits outreach using Medicare Improvements for Patients and Providers Act (MIPPA) funding. Such entities include State Health Insurance Assistance Programs (SHIPs), Area Agencies on Aging (AAAs), Aging and Disability Resource Centers (ADRCs), and other nonprofit organizations contracted with the state lead agency to conduct MIPPA outreach.

Organizations must already be helping low-income Medicare beneficiaries screen and apply for one or more of the following core benefits:

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

Organizations that participated in the pilot phase of this campaign are welcome to apply for these grants.

Qualifications of successful applicants

NCOA seeks applicants that possess the following qualifications:

- Organizational experience using Facebook and knowledge of the reports and metrics available in Facebook (e.g., through Facebook Insights or analytics)
- A staff member able to create and monitor ads in Facebook several times per week (approximately 3-4 hours total), and coordinate the campaign internally at the grantee organization (ideally this individual would be the Facebook account manager who coordinates with BEC/MIPPA grantee staff, if those functions are separate)
- Flexibility to create an ad/work schedule that enables counselors to follow up with ad leads within a short timeframe (ideally within 24 hours, but no more than 2 business days)*
- Ability to track leads and report to NCOA:
 - Number of individuals clicking through ads and completing the form, and basic demographic data on these individuals
 - Follow-up with form completers (how many able to reach and screen for benefits, and of those how many were eligible)
 - # of benefits applications submitted
 - # of benefits enrolled in (if available)
 - \$ amount of benefits received (if available)

Grantee flexibility

*NCOA's pilot campaign results show that perhaps the most important factor in whether a lead completes a screening and applies for benefits is how soon the organization can follow up with the individual after submitting the form. Thus, grantees will be provided flexibility to adjust when ads are run in order to accommodate timely follow-up from staff and volunteers. For example, a grantee may choose to run ads on Tuesdays, Saturdays, and Sundays, with dedicated follow-up on Wednesdays and Mondays. Ads do not necessarily need to run daily, but grantees will be expected to create a schedule that works for timely follow-up and adequate time to test ad performance.

Successful applicants will also have the flexibility to select which benefits to emphasize in the ads themselves. For example, a AAA that does MIPPA outreach may prefer to focus solely on MSP outreach, while a BEC may test ads for multiple benefits and determine that ads for SNAP are most successful, and choose to run those ads exclusively throughout the life of the campaign.

Preferred qualifications

In addition to the qualifications listed above, NCOA will weigh the following factors in consideration of its awards:

- The applicant serves a densely populated or broad geographic area with a significant number of Medicare beneficiaries who are not enrolled in key benefits
- Previous experience with Facebook ads or boosted posts is a plus
- Ability/enthusiasm to sustain the effort (if successful) following the grant cycle

Grant Direction and Technical Assistance Resources

For this MIPPA/benefits outreach Facebook ad campaign, grantee organizations will receive support to:

- Identify targeting parameters for the ads (e.g., zip codes, age, etc.)
- Develop ads with messages and images suitable to the grantee's target audience (templates available from NCOA)
- Set up a form to collect lead information coming in from ads
- Implement the Facebook ad campaign (grantees will need to consider staffing schedules to determine the frequency of ads and how follow-up will occur in a timely fashion)
- Collect and analyze data from Facebook on ad success (e.g., click-through rate, number of form completers, number of qualified leads eligible for benefits) and report back monthly to NCOA.

Grants will be offered for a six-month period beginning in early March 2018. Grantees will be requested to submit data about their ad performance monthly to NCOA.

Use of Grant Funds

It is expected that up to ten (10) grants of \$10,000 each will be awarded for a six-month period beginning in early March 2018 and running through late August/early September 2018.

Grant monies will be used to purchase Facebook ads and support additional staff/volunteer time. Successful applicants will have the flexibility to allocate grant monies as they see fit across these two categories, though NCOA encourages grantees to set a minimum budget of \$500 per month to purchase ads.

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/hsgps107.pdf>

As a condition of accepting grant funds, grantees must meet NCOA requirements for the submission of data and final reports.

How to Apply

1. **Notice of Intent.** Organizations wishing to apply for funds under this program should submit a notice to the Center indicating their intent to apply by **Friday, Feb. 2, 2018 at 12 p.m. ET** using the form at <https://ncoa.tfaforms.net/373923>. Those that submit a notice of intent will be

provided a link to complete the application process.

2. **Application.** Applicants must submit an electronic proposal describing the applicant's previous experience with Facebook and their interest in using this outreach tactic. Proposals must follow the character count outlined in Attachment A. Character count includes spaces.

All proposals should be submitted **electronically no later than Feb. 14, 2018 by 5 p.m. ET** through the web-based system. Electronic submission guidance will be emailed to the email address specified on the notice of intent prior to the deadline. Emailed submissions will not be considered. All sections of the proposal must be submitted by this deadline; the Center will not accept any materials submitted late, and we will not be able to review incomplete proposals. Applicants selected to receive grants will be notified by the end of February 2018.

Inquiries

All inquiries regarding this RFP should be **emailed** to centerforbenefits@ncoa.org.

Timeline

RFP issued: January 22, 2018

Optional letter of intent due: February 2, 2018 at 12 p.m. ET (submit to <https://ncoa.tfaforms.net/373923>)

Final proposals due: February 14, 2018 at 5 p.m. ET

Attachment A - Facebook Ad Campaign Implementation Plan

Character limits include spaces.

** indicates optional.*

1. Applicant information:

Organization Name

Project Director

Street Address

City/State /Zip

Telephone

E-mail

Hours of Operation

Website

Organizational Facebook, Twitter, and/or LinkedIn

2. MIPPA role:

Check box to indicate whether applicant is a BEC or MIPPA-funded state/local agency

3. Target area/audience [1000 character limit]

Please describe your organization/agency's service area (e.g., city, county, multiple counties) and target audience. Are there specific groups of underserved individuals in your area that you would like to serve in a greater capacity?

4. Facebook/ web experience [1000 character limit]

a. Describe your organization's previous/current experience using Facebook: How long have you used this social media platform? In what capacity (posts, boosted posts, ads, etc.) and with what frequency? Who manages your organizational Facebook account?

b. Does your organization have its own website? How frequently is it updated? Are you able to create intake forms on your website?

5. Current capacity/client workflow [2000 character limit]

a. How many clients does your agency typically serve each week/month?

b. How many staff/volunteers currently assist clients with benefits access?

c. Please describe your current process for benefits screening and application assistance. How do clients typically first get in touch with your organization? Is there a waiting period between first contacting you and receiving a benefits screening? Which benefits do you help clients screen and apply for? Do you typically follow up with clients to see that they were enrolled in the programs they applied for?

d. Does your organization have the flexibility to alter staff/volunteer schedules to accommodate increased demand for services?

e. What data do you currently track related to your benefits access work?

6. Management and Organizational Capacity [1000 character limit]

a. Identify the individual who will lead the Facebook ad campaign within your organization. What is their current role? **This role cannot be filled by executive level staff.**

- b. Explain how this project fits within your current benefits outreach efforts, and your ability to sustain the work after the grant period ends.

Attachment B - Data Elements and Definitions

Successful applicants will be asked to report monthly figures to NCOA about the progress of the ad campaign. These reports will be due to NCOA on the 15th of the following month.

Data to be included in the report:

- Facebook ad spend (\$ spent) and approximate frequency of ads
- Audience size and reach (as estimated by Facebook)
- Cost per click and cost per lead
- Number of individuals who clicked on the ad
- Number of individuals who completed the initial info form
- How many form completers you were able to reach and screen for benefits, and of those:
 - How many were eligible (and for which programs)
 - The number of benefits applications submitted
 - Did the client get enrolled in the benefit(s)? (if available)
 - \$ amount of benefits received (if available)

The technical assistance vendor will help grantees to collect and analyze some of the Facebook data to be included in the monthly reports.