

National Benefits Helpline: Frequently Asked Questions (FAQ)

The following Frequently Asked Questions (FAQ) provide clarification and additional context regarding the National Council on Aging's (NCOA) **Benefits Helpline Request for Proposals (RFP)**. These responses are intended to guide potential vendors in preparing responsive and competitive proposals. The FAQ address expectations around operations, staffing, data management, performance measurement, and collaboration with NCOA's Benefits Enrollment Center (BEC) network.

Proposal Submission & Contract Process

Q: What content must be included in the Letter of Intent?

A: The letter should include the name of the applying organization, contact information for the primary point of contact, a brief description of experience operating or managing a call center/helpline, and a statement confirming intent to submit a full proposal.

Q: Should the full proposal questions (on pages 5–6 of the RFP) be addressed in the Letter of Intent?

A: No. The questions on pages 5–6 are the items that should be addressed in the full concept submission, not the Letter of Intent.

Q: Will NCOA provide technical assistance to finalists preparing their full proposals?

A: No. However, finalists will receive guidance on how to prepare for the interview process.

Q: Will NCOA provide guidance on setting up the helpline?

A: NCOA expects the vendor to already have experience providing call center support. However, NCOA will provide support and guidance on setting up the vendor's account in Cumulus (Canto) to ensure familiarity with the network, systems, and workflow for connecting clients to BECs.

Q: Will the contractor have the opportunity to join BEC meetings for best practice sharing?

A: Instead of joining BEC meetings, the vendor will have regular meetings with their designated NCOA point of contact to discuss updates, challenges, and opportunities for improvement.

Q: How will this project be monitored by NCOA?

A: There will be a designated point person at NCOA responsible for overseeing and managing this contract. This individual will serve as the primary contact and provide ongoing guidance and support.

Funding, Budget, and Federal Guidelines

Q: What is the total funding amount available for this contract?

A: The total funding amount is open at this stage. The final award will be based on the proposed budget that best aligns with the scope of services and demonstrates cost-effectiveness.

Q: What is the maximum available indirect cost rate?

A: The maximum available indirect rate is **15%**, unless the applicant has a documented Negotiated Indirect Cost Rate Agreement (NICRA).

Q: Will the contract commit funds for the full 31-month project term, and how should the budget be structured?

A: The proposal should include a complete budget covering the **full 31-month contract period**, broken out by year as follows:

- Year 1: February 2025–January 2026
- Year 2: February 2026–January 2027
- Year 3: February 2027–August 2028

The budget should reflect a **fixed monthly amount** consistent for the duration of the agreement.

Q: What is the payment schedule (reimbursement vs. advance)?

A: This will be a reimbursement-style contract. The vendor must submit monthly invoices, and payments will be issued as a fixed monthly amount.

Q: Will the contract be awarded to a single entity, and what federal guidelines apply?

A: Yes, the contract will be awarded to a single entity. The grantee will be subject to the federal guidelines outlined in the RFP, and any additional compliance requirements will be communicated as needed.

Operational Scope, Timeline, and Promotion

Q: Is this RFP requesting that the helpline be established?

A: NCOA is not requesting that the helpline be established. We are seeking a vendor to sustain and strengthen existing operations and serve as a thought partner on expanding the quality and impact of the service.

Q: What historical timeframe is used for the average call/chat volume (375 calls and 180 chats)?

A: This monthly average represents the past two years of operation. Volume may fluctuate based on NCOA's periodic paid media campaigns and outreach efforts.

Q: With the time frame between notification of award and beginning of services, what is the expectation for service readiness?

A: The vendor is expected to have the infrastructure in place to accommodate the service by **Feb.1, 2026**. Onboarding and system alignment with NCOA will occur during the month of February.

Q: Does NCOA observe federal holidays?

A: Yes. NCOA generally observes the standard federal holiday schedule. Vendors may align operations accordingly or propose an alternative coverage plan.

Q: What is NCOA's plan for promoting the Helpline?

A: NCOA has historically taken the lead on marketing and outreach, including digital and social media campaigns, promotional materials, and PSAs. However, NCOA is open to collaborating with the selected vendor on new strategies to increase visibility and engagement.

Staffing, Accessibility, and Service Delivery

Q: What is the expectation for staffing levels to handle the average volume?

A: NCOA does not manage staffing for the helpline vendor. Determining the number of agents needed will be the vendor's responsibility. Staffing plans will be assessed based on the vendor's call center expertise and ability to manage volume effectively.

Q: What is the expectation for providing after-hours support via chat or messaging?

A: The goal is to ensure the helpline is accessible in multiple ways. After-hours support does not require 24/7 live coverage. Vendors should propose reasonable approaches—such as chatbots, web forms, or follow-up scheduling—that maintain accessibility while being efficient.

Q: How should the helpline be identified to the caller?

A: Calls should be answered as if coming from NCOA's BenefitsCheckUp® Helpline, aligning with the branding and identity used to assist older adults with benefits eligibility.

Q: Regarding same-day Spanish support, is there a minimum ratio of bilingual staff NCOA expects or is reliance on the Language Line sufficient?

A: NCOA does not require a specific ratio of bilingual staff, but same-day Spanish language support must be consistently available—through bilingual staff, Language Line, or a combination.

Q: Is there an issue with providing referrals beyond the four core programs (Medicare Part D Extra Help, MSP, Medicaid, SNAP)?

A: No. While these are the primary focus, staff are encouraged to use BenefitsCheckUp® to connect callers to other relevant benefits or services as appropriate.

Q: Are there minimum or maximum call volume or screening targets?

A: No. NCOA does not prescribe minimum or maximum targets. Vendors should propose flexible staffing and performance models that can scale with demand.

Data Systems, Technology, and Reporting

Q: Are the costs of using Cumulus (Canto) currently being covered by NCOA? Would NCOA expect the grantee to assume these costs?

A: NCOA will cover the costs for vendor access to Cumulus (Canto). Vendors using their own CRM do so at their own expense and must integrate call data into Cumulus monthly via API or approved method.

Q: Will NCOA provide API access for Cumulus integration?

A: Yes. NCOA will provide API access and documentation for vendors who choose to integrate with Cumulus (Canto).

Q: Who is considered the “local provider” for participant referral export?

A: “Our network” refers to NCOA’s Benefits Enrollment Centers (BECs) or verified partners via BenefitsCheckUp®. If no BEC is active, contractors should share information on available providers and send follow-up materials by email or mail.

Q: What data security protocols are required for transferring participant information?

A: All participant information must be transferred using secure, encrypted methods in compliance with federal privacy and security standards.

Q: Does NCOA have pre-existing survey tools or templates for post-call evaluation?

A: Yes. NCOA has an existing post-call survey tool to assess participant satisfaction and service quality and is open to collaborating on updates or enhancements.

Q: Are there additional key performance indicators (KPIs) beyond those listed that NCOA wants monitored?

A: NCOA encourages monitoring the core KPIs outlined in the RFP—call/chat response times, satisfaction, screening completion, and referrals—and welcomes vendor-proposed metrics that enhance measurement of impact.

Training, Performance, and Continuous Improvement

Q: How frequently does NCOA expect staff training or refreshers?

A: Vendors must provide initial training before launch and periodic refreshers as needed (e.g., when benefits programs or systems are updated).

Q: What is NCOA's position on using chatbots?

A: NCOA is open to the use of chatbots or automated tools to support accessibility and after-hours inquiries, provided they comply with privacy, accessibility, and data security standards.