REQUEST FOR PROPOSALS

Secret Shopper/Mystery Shopping Evaluation of the Aging and Disability Resource Connection

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1. INTRODUCTION

The Atlanta Regional Commission (ARC) is the regional planning, development, and intergovernmental coordination agency for the 10-county metro Atlanta region, which includes Cherokee, Clayton, Cobb, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry, and Rockdale counties.

ARC is the federally designated Area Agency on Aging (AAA) for the metro Atlanta region. These responsibilities are administered through ARC's Aging & Independence Services (A&IS) Department. A&IS serves the needs of older adults, adults with disabilities, and caregivers while also planning and advocating for the needs of future generations. Approximately 900,000 people age 60 or older live in the region, representing approximately 35% of Georgia's older adult population.

ARC is soliciting proposals from qualified firms with demonstrated expertise in mystery shopping, secret shopping, customer-experience evaluation, call-center assessment, accessibility testing, and related customer-engagement services.

The selected Contractor will evaluate the accessibility, responsiveness, and overall customer experience of ARC's Aging and Disability Resource Connection (ADRC). The evaluation will include testing ARC's Platform 28 (P28) telephone system and designated email touchpoints, reviewing staff adherence to applicable policies and procedures, and assessing follow-up against the Georgia Division of Aging Services (DAS) Standards of Promptness.

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2. ADRC BACKGROUND

The ADRC provides information, referral, screening, counseling, and access to long-term services and supports for older adults, adults with disabilities, and caregivers. The ADRC receives more than 72,000 requests for assistance annually.

The ADRC consists of three primary teams:

1. Information and Referral (I&R);
2. Elderly and Disabled Waiver Program (EDWP); and
3. Home and Community-Based Services (HCBS).

ADRC programs and services include:

- Information and Referral services;
- Intake and screening for non-Medicaid home- and community-based services, including home-delivered meals, personal care, and homemaker services;
- Intake and screening for the Medicaid-funded Elderly and Disabled Waiver Program;
- Benjamin Rose Institute Care Consultation;
- Community Options Counseling;
- Material Aid Assistance;
- Time-limited or innovative programs; and
- Coordination with Georgia Memory Net's Memory Assessment Clinics.

ADRC services are provided by trained and experienced Certified Information and Referral Counselors. ADRC material is available in English, Spanish, Vietnamese, Chinese, Korean, and Russian.

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3. PURPOSE AND OBJECTIVES

The purpose of this RFP is to select a Contractor to gather objective information from telephone and email touchpoints and provide actionable findings regarding the customer experience from initial contact through resolution or completion.

The evaluation will assess at a minimum:

- Ease of access to the ADRC;
- P28 telephone menu navigation and routing;
- Telephone and email response times;
- Length of time to connect with a counselor
- Call abandonment data;
- Voicemail response and follow-up;
- Time from the initial request for assistance through completion;
- Access to language interpretation;
- Accessibility for people with disabilities;
- Staff professionalism, clarity, accuracy, and consistency;
- Compliance with DAS Standards of Promptness;

- Compliance with applicable ADRC policies and procedures;
- Effectiveness of follow-up;
- P28 reporting capabilities and recommended reporting improvements;
- Opportunities to improve customer experience from beginning to end.

The target population represented through the mystery-shopping scenarios will include:

- Adults age 60 and older;
- Adults with disabilities; and
- Caregivers.

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4. PROCUREMENT SCHEDULE

Activity	**Date**
RFP released	October 15, 2026
Deadline to submit questions	November 13, 2026, at 3:00 p.m. ET
Responses to questions posted/distributed	November 23, 2026, by 4:00 p.m. ET
Proposal submission deadline	December 29, 2026, at 7:00 p.m. ET
Anticipated notice of award	January 25, 2027
Anticipated contract start	March 1, 2027
Initial mystery-shopping activities completed	No later than April 15, 2027
Final initial report and presentation completed	No later than June 15, 2027
Initial-scope invoicing completed	No later than June 30, 2027
Optional follow-up phase, if exercised	To be completed no later than December 30, 2027

ARC reserves the right to revise this schedule through a written addendum.

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5. CONTRACT TERM AND OPTIONAL SERVICES

The anticipated contract period is March 1, 2027, through December 30, 2027.

The initial mystery-shopping evaluation must be conducted no later than April 15, 2027. The written report and presentation of findings must be completed no later than June 15, 2027. First invoice must be received no later than June 30, 2027.

ARC may, at its sole discretion and subject to funding availability, authorize an optional second round of mystery shopping within approximately six months of the initial evaluation. The purpose of the optional round would be to evaluate corrective actions, measure improvement, and identify remaining performance gaps.

Any optional work must be authorized through a written contract amendment. ARC may reallocate tasks and funding through such an amendment. The proposal must separately identify costs for the initial scope and the optional follow-up phase.

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6. APPLICANT ELIGIBILITY

Individuals and organizations, whether for-profit or nonprofit, are eligible to apply if they possess the experience and expertise necessary to perform the work described in this RFP.

To be considered, Proposers must demonstrate:

- Experience performing mystery-shopping, secret-shopping, call-center, customer-experience, or similar evaluations;
- Experience completing comparable projects within the past five years;
- Understanding of the needs of older adults, adults with disabilities, and caregivers;
- Understanding of accessibility, multilingual communication, and equitable customer service;
- Ability to collect, analyze, protect, and report sensitive information;
- Ability to manage work within established budgets and schedules; and
- A clear understanding of the mission and core work of ARC's A&IS Department.

ARC reserves the right to contact and evaluate all references provided.

The selected Contractor will be required to comply with all applicable federal, state, and local requirements, including, as applicable:

- General financial requirements and assurances;
- Insurance requirements;
- Title VI of the Civil Rights Act of 1964;
- Section 504 of the Rehabilitation Act of 1973, as amended;

- The Americans with Disabilities Act of 1990, as amended;
- Health Insurance Portability and Accountability Act requirements;
- Disclosure of lobbying activities;
- Debarment, suspension, and other responsibility requirements;
- Drug-Free Workplace requirements; and
- Applicable lobbying restrictions.

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7. REQUIRED CONTRACTOR CAPABILITIES

The selected Contractor must demonstrate the ability to:

- Design and conduct objective mystery-shopping evaluations;
- Recruit, train, and supervise qualified mystery shoppers;
- Conduct multilingual and disability-accessibility scenarios;
- Evaluate telephone, voicemail, and email customer-service channels;
- Analyze P28 or comparable call-center system reports;
- Calculate or assess customer-service performance measures;
- Maintain complete, accurate, and time-stamped evaluation records;
- Apply quality-control procedures to mystery-shopping data;
- Protect confidential information;
- Comply with HIPAA and execute ARC's Business Associate Agreement;
- Produce clear, actionable reports and recommendations;
- Present findings effectively to staff and leadership; and
- Complete all work within the approved schedule and budget.

The Contractor should also possess:

- Strong project-management and organizational capabilities;
- Sound analytical and financial management skills;
- Strong writing and presentation abilities;

- Proficiency with commonly used data-analysis, project-management, and Microsoft Office applications;
- High ethical standards;
- Experience working with public-sector or human-services organizations; and
- An understanding of metro Atlanta's population and service environment.

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8. PROPOSAL FORMAT AND CONTENT

Proposals must be submitted electronically in PDF or Microsoft Word-compatible format.

Proposals must not exceed 15 pages, using standard 8.5-by-11-inch pages and a font size of at least 12 points. Resumes and descriptions of firm experience count toward the 15-page limit. Covers, introductory letters, dividers, end sheets, and required budget forms do not count toward the page limit.

Each proposal must include the following:

8.1 Business Information

1. Legal name of the firm;
2. Business address;
3. Geographic location of the office that will perform the work;
4. Name, title, telephone number, mailing address, and email address of the primary contact; and
5. Identification of any partner firms or subcontractors.

8.2 Qualifications and Experience

1. Description of the business qualifications and technical competence;
2. Description of experience with similar mystery-shopping, call-center, accessibility, multilingual, or customer-experience projects;
3. Description of experience working with public agencies, aging services, disability services, health care, or other human-service organizations;
4. At least three references for similar work completed within the past five years, including current contact information; and
5. Examples of how previous work resulted in measurable operational or customer-experience improvements.

8.3 Project Team

1. Identification of key project personnel;
2. Roles and responsibilities of each team member;
3. Qualifications and relevant experience of each team member;
4. Identification and qualifications of proposed mystery shoppers, language specialists, accessibility specialists, or subcontractors, as applicable; and
5. Description of staff availability and ability to balance this project with other contractual obligations.

8.4 Technical Approach

The proposal must provide a detailed description of the proposed methodology, including:

- Project initiation and coordination;
- Review of ARC-provided scripts and performance standards;
- Mystery-shopper recruitment, screening, training, and calibration;
- Sampling methodology;
- Distribution of scenarios among the ADRC team;
- Telephone, voicemail, and email evaluation methods;
- Multilingual testing;
- Disability-accessibility testing;
- Methods for tracking response and resolution times;
- Methods for evaluating end-to-end customer experience;
- P28 data and reporting analysis;
- Evaluation of length of time to connect with a counselor and abandonment rate;
- Quality-control and data-validation methods;
- Data-security and HIPAA-compliance procedures;
- Method for identifying significant compliance or customer-safety concerns during the project;
- Reporting and presentation approach; and
- Approach to the optional follow-up evaluation.

8.5 Work Plan and Schedule

The proposal must include a detailed work plan that identifies:

- Major tasks;
- Responsible personnel;
- Milestones;
- Deliverables;
- ARC review periods;
- Initial mystery-shopping completion date;
- Draft and final report dates;
- Presentation date; and
- Proposed schedule for the optional follow-up phase.

8.6 Budget

The Proposer must submit a detailed budget using the format in Exhibit B.

The budget must separately identify:

- Initial/base scope costs;
- Optional follow-up scope costs;
- Set-up or project-initiation fees;
- Cost per attempted telephone shop;
- Cost per completed telephone shop;
- Cost per email shop;
- Multilingual testing costs;
- Accessibility-testing costs;
- Data analysis and reporting costs;
- Presentation costs;
- Travel or other direct expenses;
- Subcontractor costs; and

- Any other fees or assumptions.

8.7 Additional Information

The Proposer may include other information directly relevant to ARC's evaluation of the proposal.

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9. PROPOSAL EVALUATION

ARC will evaluate written proposals using the following criteria:

Evaluation Criterion	Weight
Related experience, qualifications, references, and proposed personnel	25%
Technical approach and methodology	25%
Work plan, schedule, and staff availability	25%
Proposed budget and overall value	25%
Total	**100%**

9.1 Budget Evaluation

ARC's budget evaluation will consider:

- Set-up fees;
- Unit cost per attempted and completed phone call;
- Unit cost per email evaluation;
- Multilingual and accessibility costs;
- Data-analysis and reporting costs;
- Optional follow-up costs;
- Total not-to-exceed cost; and
- Overall reasonableness and value.

ARC is not required to select the proposal with the lowest cost.

9.2 Interviews

ARC may invite a short list of Proposers to participate in interviews with an evaluation committee. ARC will provide the selected firms with the interview date, time, and instructions.

ARC reserves the right to make an award based solely on the written proposals without conducting interviews.

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10. PROPOSAL SUBMISSION

10.1 Questions

Questions regarding this RFP must be submitted by email no later than **3:00 p.m. ET on Friday, November 13, 2026**, to:

Sharise Byrd
Email: sbyrd@atlantaregional.org

Responses to timely submitted questions will be distributed and/or posted by **4:00 p.m. ET on Monday, November 23, 2026**.

Only written responses issued by ARC will be considered official.

10.2 Proposal Deadline

ARC must receive one electronic copy of the proposal no later than:

7:00 p.m. ET on Tuesday, December 29, 2026

Proposals must be submitted by email to:

sbyrd@atlantaregional.org

Electronic files must be submitted in PDF or Microsoft Word-compatible format. Proposers are responsible for confirming successful delivery before the deadline. Late submissions may be rejected.

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11. CONFIDENTIALITY, OPEN RECORDS, AND CONFLICTS OF INTEREST

11.1 Georgia Open Records Act

ARC is subject to the Georgia Open Records Act. Proposals and related materials submitted in response to this RFP may become public records and may be disclosed upon request.

Information that the Proposer believes qualifies as a trade secret or otherwise protected proprietary information under applicable law must be clearly and specifically marked. Confidentiality designations must be limited to the particular information claimed to be protected. ARC will not honor a designation that marks an entire proposal as confidential.

The final determination regarding disclosure will be made by ARC in accordance with applicable law.

11.2 Conflicts of Interest

Conflicts of interest are governed by ARC's Standards of Ethical Conduct, available through ARC's website.

Proposers must disclose any actual, apparent, or potential conflict of interest related to the services described in this RFP. The disclosure must include:

- The name of each individual or organization involved;
- Relevant facts regarding the potential conflict; and
- Proposed internal controls or other measures to mitigate the conflict.

ARC's Staff Legal Counsel will determine whether a disclosed conflict precludes an award.

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12. ARC RESERVATION OF RIGHTS

ARC reserves the right to:

- Award all, part, or none of the available work;
- Award work to one or more firms;
- Reject any or all proposals or portions of proposals;
- Cancel or amend this RFP;
- Waive or request correction of minor irregularities or inconsistencies;
- Request clarification or modification of any proposal;
- Negotiate any aspect of a proposal;
- Negotiate with more than one Proposer at the same time;
- Select a proposal other than the lowest-cost proposal;
- Modify the anticipated schedule;
- Verify references and information submitted; and
- Make no award if ARC determines that doing so is in its best interest.

ARC will not be responsible for costs incurred in preparing or submitting a proposal or participating in interviews or negotiations.

EXHIBIT A

SCOPE OF WORK

A.1 General

The selected Contractor will perform mystery-shopping and customer-experience evaluation services in support of ARC's A&IS Department, which administers ARC's federally designated Area Agency on Aging responsibilities.

The work will focus on the experience of older adults, adults with disabilities, and caregivers who contact the ADRC for information, screening, counseling, referral, and access to long-term services and supports.

A.2 Project Objectives

The Contractor will gather objective information from telephone and email interactions and use that information to:

1. Evaluate accessibility and ease of use;
2. Assess the timeliness and quality of ADRC responses;
3. Measure the time from initial contact through resolution or completion;
4. Evaluate multilingual access and disability accessibility;
5. Identify customer-service, process, technology, reporting, and staffing gaps;
6. Recommend practical corrective actions; and
7. Establish a baseline that may be used for a follow-up evaluation.

A.3 Initial Project Activities

The Contractor will:

1. Participate in a project kickoff meeting;
2. Review relevant ARC and DAS policies and procedures;
3. Review the P28 telephone menu and routing structure;
4. Review ARC-provided scripts, scenarios, and required measurements;
5. Review available P28 system reports and other relevant aggregate data;

6. Develop a detailed evaluation protocol;
7. Develop standardized evaluation forms and scoring criteria;
8. Submit the methodology, schedule, and evaluation tools for ARC approval; and
9. Train and calibrate all mystery shoppers before initiating calls or emails.

The Contractor may not begin mystery-shopping contacts until ARC has approved the methodology and scripts.

A.4 Mystery-Shopping Sample

A.4.1 Initial Telephone Sample

The Contractor must complete a minimum of 15 telephone mystery-shopping scenarios during the initial evaluation.

The initial sample must include five scenarios from each of the ADRC team including Information and Referral, EDWP, and HCBS.

ARC may authorize additional calls during the initial phase or the optional follow-up phase. Unless otherwise authorized through a written amendment, the cumulative number of mystery-shopping calls will not exceed 50.

Calls should be distributed across different:

- Days of the business week;
- Times of day;
- P28 menu options;
- Shopper profiles;
- Service-request types; and
- Customer circumstances.

ARC will approve the final sampling plan.

A.4.2 Voicemail and Follow-Up

If a call is not answered and a voicemail is left, the Contractor must track:

- Date and time of the initial call;
- Date and time the voicemail was left;
- Date and time of each response attempt;

- Method of response;
- Number of response attempts;
- Whether contact was completed;
- Time to initial response;
- Time to final resolution or completion; and
- Compliance with applicable ADRC Standards of Promptness.

A mystery-shopping scenario will remain open until the required evaluation period has ended or the matter has reached the ARC-defined completion point.

A.4.3 Multilingual Scenarios

For each of the three team or menu options, the Contractor must conduct at least one non-English-language scenario.

At a minimum:

- One scenario must be conducted in Spanish; and
- The remaining multilingual scenarios must use one or more of the other languages supported by the ADRC: Vietnamese, Chinese, Korean, or Russian.

The Contractor must evaluate:

- Ability to access interpretation or language assistance;
- Time required to access language assistance;
- Accuracy and clarity of communication;
- Continuity of service;
- Staff professionalism; and
- Whether the experience is reasonably comparable to English-language access.

A.4.4 Disability-Accessibility Scenarios

For each of the three team or menu options, the Contractor must conduct at least one scenario involving a disability consistent with the DAS Taxonomy of Service Definitions.

At least one scenario should evaluate access for a person with a hearing impairment. The Contractor may propose additional disability scenarios, including the use of relay, TTY, communication assistance, or other ARC-approved accessibility methods.

The Contractor must evaluate:

- Access to appropriate accommodations;
- Ease of communicating the accommodation request;
- Timeliness of the response;
- Staff knowledge and professionalism;
- Communication effectiveness; and
- Whether the customer can complete the requested transaction.

ARC will determine whether a single scenario may count toward both multilingual and disability-accessibility requirements.

A.4.5 Email Testing

The Contractor will test designated 5 minimum ADRC email touchpoints using ARC-approved scenarios with a maximum of 15. The Proposer must recommend an appropriate number and distribution of email scenarios.

The Contractor must track:

- Date and time sent;
- Confirmation or automated response;
- Date and time of the first substantive response;
- Number and method of follow-up attempts;
- Accuracy and completeness of the response;
- Time to resolution or completion; and
- Compliance with applicable response standards.

A.5 Performance Measures

The evaluation must address the following, as applicable:

Telephone-System Performance

- Length of time to connect with a counselor;
- Abandonment rate;
- Menu clarity;
- Routing accuracy;

- Transfer frequency;
- Dropped or disconnected calls;
- Voicemail availability and functionality;
- Callback timeliness;
- Interpreter access;
- Accessibility features; and
- Overall system usability.

Where a measure cannot be calculated reliably from mystery-shopping contacts alone, the Contractor will analyze available ARC-provided P28 reports and compare those results with observed customer experiences.

Staff Performance

- Timeliness;
- Professionalism and courtesy;
- Accuracy and completeness of information;
- Clear explanation of next steps;
- Active listening;
- Appropriate referrals;
- Appropriate screening or intake;
- Responsiveness to accommodation requests;
- Responsiveness to language needs;
- Follow-up quality;
- Documentation, to the extent verifiable with ARC;
- Consistency across teams; and

End-to-End Experience

- Time from first contact to staff response;
- Time from first contact to screening or assessment;
- Time from first contact to referral or resolution;
- Number of contacts required;

- Number of transfers or handoffs;
- Repetition of information;
- Unmet communication needs;
- Process gaps and delays; and
- Overall ease of obtaining assistance.

A.6 P28, Data, and Staffing Analysis

The Contractor will review available P28 reports and other ARC-provided data to identify:

- Call-volume patterns;
- Peak-demand periods;
- Response-time patterns;
- Abandonment patterns;
- Routing or transfer issues;
- Voicemail and callback performance;
- Reporting limitations;
- Data-quality concerns;
- Staffing coverage issues;
- Potential workload imbalances among teams; and
- Opportunities to improve reporting and operational decision-making.

Recommendations must address, as appropriate:

- Call routing;
- Queue configuration;
- Voicemail practices;
- Quality-assurance practices;
- Reporting dashboards;
- Performance monitoring; and
- Process or policy changes.

A.7 Deliverables

The Contractor must provide the following deliverables.

Deliverable 1: Project Work Plan

A detailed work plan that includes:

- Project schedule;
- Communication protocols;
- Sampling plan;
- Data-security procedures;
- Quality-control procedures; and
- Deliverable dates.

Deliverable 2: Evaluation Protocol and Tools

ARC-approved materials, including:

- Final scripts and scenarios;
- Shopper instructions;
- Evaluation forms;
- Scoring criteria;
- Call and email tracking tools;
- Quality-control procedures; and
- Data dictionary or metric definitions.

Deliverable 3: Initial Mystery-Shopping Evaluation

Completion of the approved telephone and email mystery-shopping activities no later than April 15, 2027.

Deliverable 4: Evaluation Dataset and Activity Log

A complete, quality-checked dataset documenting each scenario, including:

- Contact date and time;
- Channel;

- Team or menu option;
- Scenario type;
- Language;
- Disability-accessibility component;
- Response times;
- Follow-up activity;
- Outcome;
- Performance scores; and
- Evaluator notes.

The dataset must not contain unnecessary personally identifiable information or protected health information.

Deliverable 5: Draft Summary Audit Report

A draft compliance and customer-experience report that includes:

- Executive summary;
- Methodology;
- Sample description;
- Assumptions and limitations;
- Findings by team and channel;
- Findings by language and accessibility scenario;
- Telephone-system findings;
- Email findings;
- Compliance matrix;
- Response-time analysis;
- End-to-end customer-experience analysis;
- P28 reporting analysis;
- Staffing observations;
- Significant strengths;

- Performance gaps;
- Root-cause observations; and
- Prioritized recommendations.

The Summary Audit Report is a programmatic compliance assessment and does not constitute an independent financial audit.

Deliverable 6: Final Report

A final written report incorporating ARC's comments. Recommendations should be organized by:

- Priority;
- Expected impact;
- Level of effort;
- Responsible function;
- Suggested implementation timeframe; and
- Recommended performance measure.

The final report must be completed no later than June 15, 2027.

Deliverable 7: Presentation of Findings

A presentation to ARC staff and leadership that summarizes:

- Methodology;
- Key findings;
- Areas of compliance;
- Performance gaps;
- Immediate corrective actions;
- Longer-term recommendations; and
- Proposed measures for ongoing monitoring.

The presentation must be completed no later than June 15, 2027.

Deliverable 8: Optional Follow-Up Evaluation

If authorized by ARC, the Contractor will repeat all or part of the evaluation to:

- Assess implementation of recommendations;

- Measure changes in performance;
- Compare results with the initial baseline;
- Identify remaining gaps; and
- Provide an updated report and presentation.

The sample size, schedule, and deliverables for the optional phase will be established through a written contract amendment.

A.8 Significant Findings and Escalation

The Contractor must promptly notify ARC's designated project manager of any issue that may involve:

- Immediate customer safety;
- Discriminatory treatment;
- Significant accessibility barriers;
- Repeated failure to respond;
- Material noncompliance with policy;
- Inappropriate disclosure of protected information; or
- Other significant operational or ethical concerns.

The Contractor must not wait until the draft or final report to disclose a potentially serious issue.

A.9 Confidentiality, HIPAA, and Data Security

The selected Contractor must:

- Execute ARC's Business Associate Agreement;
- Comply with all applicable HIPAA requirements;
- Use ARC-approved fictional personas and test information;
- Avoid using actual client information unless expressly authorized;
- Collect only the minimum information necessary;
- Protect information during collection, storage, transmission, and reporting;
- Limit access to authorized project personnel;

- Provide ARC with identifiers needed to locate and address test records;
- Follow ARC's instructions for secure data transfer and disposal;
- Notify ARC promptly of any suspected privacy or security incident; and
- Return or securely destroy project data at the end of the contract, as directed by ARC.

Calls may not be recorded without ARC's prior written approval. Any approved recording must comply with applicable federal and state laws.

A.10 ARC Responsibilities

ARC will:

- Designate a project manager;
- Provide approved scripts and scenario requirements;
- Provide the required performance measures;
- Provide applicable policies and procedures;
- Provide information regarding the P28 system and menu structure;
- Provide available aggregate P28 reports and relevant data;
- Coordinate access to authorized staff or systems, when necessary;
- Review and approve the methodology and evaluation tools;
- Provide timely feedback on draft deliverables; and
- Coordinate the identification and disposition of test records.

APPENDIX A-1

APPLICABLE DAS PERFORMANCE AND QUALITY STANDARDS

The selected Contractor must evaluate compliance with the following requirements to the extent observable through mystery shopping or verifiable through ARC-provided records. The current DAS Policy and Procedure Manual will control if there is a conflict between this summary and the official policy.

Section 5301: Standards of Promptness for the ADRC

Overview

Access-services staff must respond to inquiries and requests for information, assistance, and screening as requests are received, regardless of the method of contact. Contact methods may include telephone, fax, mail, email, walk-in contact, website inquiry, or another approved method.

Requirements

1. Staff must handle requests in the order received and make every effort to initiate contact within two business days of the referral date.
2. The referral date is the date on which the applicant or caller initiates contact by telephone, voicemail, email, web intake, or fax. For mailed referrals, the referral date is the business date on which the office receives the mail.
3. For online web intake, the referral date is the date the call record was created in the DAS Data System (DDS), not the date the record was assigned to an ADRC Counselor or staff member.
4. The referral date and method of contact must be clearly documented in the notes section of the call and client record in DDS.
5. For web intake, fax, and paper referrals, staff must make two attempts by telephone to schedule the initial screening:
    - The first attempt must be a direct telephone call.
    - The second attempt may be made by telephone or text.
    - The two attempts must occur on different days.
6. If staff cannot contact the client, an Attempt/Unable to Contact letter must be mailed, providing the client 10 business days to respond before the record is closed.
7. If staff cannot leave a voicemail, the referral source must be contacted to verify the client's contact information.
8. For unanswered calls or voicemail referrals, at least one attempt must be made to contact the person for each new voicemail received.
9. EDWP eligibility assessments or the Triage, when required, must be completed within 10 business days of the referral date unless completion is prevented by the client's or caller's availability.
10. The AAA must arrange for ADRC Counselors to meet the needs of clients and callers who are unavailable during normal operating hours.
11. If the client or caller misses a scheduled appointment, ADRC staff must mail a missed-appointment letter and close the file in accordance with applicable procedures.

12. All attempts to reach the client or caller must be documented in DDS.
13. Documentation must be entered in DDS within one business day unless delayed by a system outage or another technical issue beyond the user's control.

EXHIBIT B

PROPOSED PROJECT BUDGET

Proposers must submit the budget in both formats below. Initial-scope and optional-scope costs must be shown separately.

B.1 Labor-Focused Budget

1. Direct Labor

Position/Role	Estimated Hours	Hourly Rate	Total Cost

Total Direct Labor: $_____

2. Indirect or Overhead Costs

Identify the approved indirect-cost rate, cost base, and calculation, if applicable.

Rate: ***%***
Cost Base: $___
Total Indirect/Overhead: $_____

3. Other Direct Costs

List each cost and the basis for calculation.

Item	Calculation/Basis	Total Cost

Total Other Direct Costs: $_____

4. Subcontracts

Subcontractor	Purpose	Rate/Basis	Total Cost

Total Subcontracts: $_____

5. Travel

List any anticipated travel by type, number of trips or miles, rate, and purpose.

Total Travel: $_____

6. Profit or Fee

Identify the percentage rate and basis.

Total Profit/Fee: $_____

7. Total Costs

Cost Category	Initial Scope	Optional Scope	Total
Direct labor			
Indirect/overhead			
Other direct costs			
Subcontracts			
Travel			
Profit/fee			
Total Not-to-Exceed Cost			

B.2 Task-Focused Budget

Task	Initial Scope	Optional Scope
Task 1: Project kickoff and work plan	$	$
Task 2: Evaluation design, scripts, and tools	$	$
Task 3: Telephone mystery-shopping activities	$	$
Task 4: Email mystery-shopping activities	$	$
Task 5: Multilingual and accessibility testing	$	$
Task 6: P28, performance, and staffing analysis	$	$
Task 7: Draft and final report	$	$
Task 8: Presentation of findings	$	$
Task 9: Optional follow-up evaluation	N/A	$
Total	**$**	**$**

B.3 Unit-Price Schedule

Unit	Proposed Price
Project set-up fee	$
Attempted telephone shop	$
Completed telephone shop	$
Voicemail and callback tracking scenario	$
Email mystery-shopping scenario	$
Spanish-language scenario	$
Other non-English-language scenario	$
Disability-accessibility scenario	$
Additional data-analysis hour	$
Additional presentation or meeting	$
Other proposed unit cost—describe	$

The Proposer must clearly identify all pricing assumptions, minimum charges, surcharges, and services excluded from the proposed budget.