



REQUEST FOR PROPOSAL

Research Consultant

Proposals must be submitted no later than 5 p.m.

September 23rd, 2022

Loren Ulrich

Abuse in Later Life Prevention and Coordinator

Vera House, Inc.

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Introduction:

Vera House, Inc. is seeking proposals from research consultants with preferred experience in survey/assessment instrument development, qualitative interviewing, and program evaluation to support the enhancement and expansion of our *Preventing Financial Exploitation of Older Adults* training curriculum for financial professionals and others who interface with older adults.

Vera House, Inc. seeks a qualified research consultant to provide services to include:

- Assessment of knowledge and skill retention of previous training participants
- Investigation of feasibility of the existing training curriculum for both current target audience (financial professionals) and for new audiences who may witness financial exploitation of older adults
- Evaluation of the efficacy of a modified version of the training curriculum (to be modified using data and insights gained from the aforementioned activities)

We are specifically seeking a consultant who is certified as a Minority and/or Women Owned Business Enterprise in New York State.

Organizational Background:

Vera House, Inc. is a human service agency with over 40 years of experience in delivering both direct victim services and community-level prevention efforts related to domestic and sexual violence, abuse in later life, and other forms of harm. Vera House's Abuse in Later Life (ALL) Program is on the forefront of both delivering innovative interventions to respond to abuse and developing cutting-edge strategies to prevent abuse from occurring in the first place.

Project History:

The field of elder abuse is thought to be 30 years behind the fields of domestic and sexual violence when it comes to primary prevention. Vera House's community education efforts have long been grounded in primary prevention principles. Thus, the ALL Program was acutely aware of the lack of primary prevention thinking in the field of elder abuse and was well-positioned to leverage the agency's experience to bring innovative primary prevention work to the field. In 2021, the ALL Program launched a groundbreaking elder abuse prevention initiative over three phases:

1. Curriculum Development
 - Developed a training curriculum for financial professionals consisting of three 2-hour modules covering 1) foundational knowledge of elder abuse and financial exploitation; 2) bystander intervention techniques; and 3) social norms, ageism, and the importance of an intersectional, anti-oppressive approach when intervening to prevent abuse. PowerPoints, instructor guide, and participant manual were developed.
2. Formative Focus Groups
 - Held three 2-hour focus groups in which a representative sampling of each module was delivered to 13 professionals from local financial institutions. Evaluator solicited feedback from participants on content and facilitation.
 - Feedback from focus group participants was used to adapt and improve the curriculum in preparation for the pilot.
3. Pilot Implementation
 - Piloted curriculum with 3 cohorts (68 participants total). Participants took a pre-test at the start of Module 1, and a post-test after Module 3.
 - Pre- and post-test results and observational data were analyzed to compose a final evaluation report summarizing the efficacy of the curriculum.

The results of the pilot evaluation demonstrated that the initiative holds significant promise for promoting the primary prevention of elder abuse. In their final report, the evaluators wrote:

“Overall, the pilot implementation successfully accomplished its training goals. Participants experienced a great deal of learning and could competently discuss the knowledge they gained and issues around utilizing it. They also found great value in the intervention strategies that were discussed and reported that they were confident they would be able to use their newly learned skills in situations that call for them. The training is effective and acceptable to participants as a reasonable way to learn about these issues and the skills required to minimize abuse and financial exploitation towards older adults.”

While participants reported enhanced knowledge, skills, and confidence across all areas measured, certain capacities showed especially notable improvement as a result of the training:

- 73.3% increase in skill development around using effective bystander intervention strategies
- 67.1% increase in confidence to intervene in a situation where they witness potential abuse
- 69.4% increase in ability to recognize the unique challenges faced by marginalized older adults
- 68.1% increase in their comfort to intervene in a situation involving a marginalized older adult

Current Project Description:

The current project seeks to build upon the work completed in 2021 by enhancing the existing curriculum to better meet the needs of our original target audience, expanding the scope of the project to reach additional audiences, and continuing to build an evidence base for the training’s efficacy through further pilot testing.

Firstly, we hope to assess whether past participants have retained the knowledge and skills they gained during the 2021 training, and if they have been able to apply this knowledge and skillset to their work. This will help us to understand whether the impacts of the training have endured over time and if they have continued to be applicable to the work of our 2021 target audience (financial professionals). This, in turn, will inform whether any changes need to be made to the existing curriculum to enhance its long-term efficacy.

Secondly, we would like to more fully investigate the existing curriculum’s feasibility for both our current target audience as well as for additional audiences. In the pilot process described in the previous section, we had difficulty recruiting sufficient numbers of financial professionals to participate in the training due to staffing constraints, scheduling issues, and other barriers. We would like to understand how we might be able to modify our training structure and delivery to better meet the needs of the financial industry audience. Additionally, we hope to explore whether other audiences who interface with older adults may benefit from undergoing similar training, and how we might be able to customize the curriculum to meet the unique needs of these audiences.

Finally, if the above activities result in the creation of modified version(s) of the existing curriculum, we would like to evaluate the effectiveness of the modified content by piloting it with new training participants.

Vendor Proposals – Project Timeline, Scope, & Budget:

Project bidders should submit a timeline, scope of services, and outline of costs. The budget may not exceed a total of \$19,500 due to funding source constraints.

RFP and Project Timeline:

RFP distribution to vendors	September 9, 2022
Questions/inquiries to lulrich@verahouse.org	September 16, 2022
Responses to questions/inquiries	September 20, 2022
Proposal due date	September 23, 2022 by 5pm
Review of proposals and vendor interviews	Week of September 26, 2022
Anticipated decision and selection of vendor	September 30, 2022
Anticipated commencement date of work	On or after October 1, 2022
Completion date	September 30, 2023

Selection Criteria:

Proposal Submissions should include the following:

Firm Information, including

- The company name, contact name, mailing address, telephone number, fax number, email address, and website
- Name(s) of staff members who would be assigned to this project and the functions to be performed by each
- A description of the qualifications of the staff who would work on the project

Cover Letter and Resume of project staff**Project Approach**

- A concise narrative detailing the proposed approach to the project

Experience

- Three references with a brief description of the relationship and contact information
- Work samples that include relevant examples of assessment/program evaluation projects the firm has completed

Proposed project timeline and work plan**Costs**

- Estimated budget for all work
- Agencies must agree to keep the quoted pricing in their proposals for a minimum of 90 days after proposal submission

Contact information and deadline for submission:

This RFP will be posted on the Vera House, Inc. website, www.verahouse.org, and may be distributed to individual firms. Questions regarding this RFP must be submitted via email to lulrich@verahouse.org by September 16, 2022. Responses will be shared no later than September 20, 2022. Inquiries will only be received and answered by email. Respondents must submit a copy of their proposal in PDF via email to lulrich@verahouse.org by 5:00pm on September 23, 2022.

Rights:

Vera House, Inc. reserves the right to award the bidder that presents the best value as determined solely by Vera House, Inc. in its absolute discretion. Vera House, Inc. reserves the right to reject any or all bid proposals, in whole and in part, received in response to the RFP prior to engagement.