



# REQUEST FOR PROPOSAL

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## **User Experience (UX) Research & Design for the 988 Suicide & Crisis Lifeline**

**RFP# 2023-0501**

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### RFP Timeline

**Issue Date:** May 15, 2023

**RFP Questions due:** May 29, 2023

**Due Date:** June 19, 2023

**Vendor Notification By:** August 14, 2023



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## Introduction and Background

### **Our Vision**

Everyone can achieve emotional wellbeing with dignity and respect.

### **Our Mission**

We work with individuals and families to help them achieve mental and emotional wellbeing. Our groundbreaking solutions deliver high quality services and support, when, where and how they need it. Our education and advocacy work shift policy and public opinion so mental wellbeing become a social responsibility and is treated with the importance it deserves. We're advancing access, dignity and respect for all and revolutionizing the system for good.

### **Organization Background**

For over 50 years, Vibrant Emotional Health (formerly The Mental Health Association of New York City, MHA-NYC), has been at the forefront of promoting emotional well-being and expanding access to needed behavioral health services and supports. Vibrant Emotional Health, a 501(c)(3), underwent a complete rebrand a few years ago, allowing us to better articulate and extend the reach of our state-of-the-art technology-enabled services, community wellness programs, and advocacy and education work. Our new name communicates our hope for, and commitment to all who are struggling with mental health and emotional challenges, and for a culture that values and supports emotional wellbeing. As leaders, advocates, educators, and innovators in mental health services, we work every single day to help save lives and assist people in getting quality care and supports. Our vision and mission reflect this commitment.

Vibrant Emotional Health (Vibrant) embodies a high tech, high touch approach to reach more people in need of care. Our contributions to the advancement of behavioral health crisis care, mental health awareness, family and youth support and emotional wellness are nationally recognized. We have led pioneering efforts to bring text, chat and other digital solutions into crisis services and have greatly expanded the types of services that can be seamlessly reached through our contact center programs. The robust administrative support from Vibrant's accomplished Information Technology Department and People Operations, Finance, Project



Management and Quality Improvement Teams helps to facilitate the smooth operation of existing programs and services as well as the implementation of new programs.

The name change also acknowledges our growth from a local mental health organization into a nationally recognized leader in mental health care and mental health awareness. Vibrant was formed in 1969 as The Mental Health Association of New York City, a local mental health advocacy organization that grew into a national leader in delivering groundbreaking solutions that have advanced behavioral health care and crisis services. Vibrant's four primary lines of business are:

1. Administration of National Networks;
2. Here2Help (H2H) Contact Center;
3. Community Services; and
4. Advocacy and Education/Training.

Although Vibrant's work is increasingly national in reach, we continue to maintain a local footprint to deliver face to face direct community services. Vibrant is headquartered in New York City with direct service satellite sites in Manhattan, Queens, Bronx, and Staten Island and has over 775 employees.

Vibrant also is the administrator of the 988 Suicide & Crisis Lifeline (988 Lifeline; funded by the Substance Abuse and Mental Health Services Administration; SAMHSA). The 988 Lifeline is a leader in suicide prevention and mental health crisis care and provides free and confidential emotional support and crisis counseling to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week, across the United States. The 988 Lifeline comprises a national network of more than 200 local crisis centers, uniting local resources with national best practices. Since its inception in 2005, the Lifeline has engaged in innovative public messaging, development of best practices in mental health, creative partnerships, and more to improve crisis services and advance suicide prevention for all.

## Purpose of the Request for Proposal

Vibrant Emotional Health is issuing this RFP to contract with a user experience (UX) research firm to collaboratively design and conduct initial user research and inform development of Vibrant's formal process for routine and continuous UX research (including usability testing). The plan to inform Vibrant's formal process must include staffing needs and potential partnerships to ensure that Vibrant can continually conduct UX research and usability testing following the end of the contract with the chosen UX research firm. In addition, the plan must consider the



cost-effectiveness and feasibility of developing an internal team versus continuing to work with external collaborators and which approach (or combination of approaches) is more sustainable over the short and long-term for Vibrant and the 988 Suicide & Crisis Lifeline.

The 988 Suicide & Crisis Lifeline received more than 2.1 million contacts (calls, texts and chats) from July to December 2022 and with expected increases in volume over time, Vibrant needs to ensure that the user experience is consistent throughout as well as equitable and trauma-informed. As an input into this prioritization and establishing a strategy, Vibrant needs user research conducted to help:

1. identify opportunity areas,
2. assess goals/expectations, needs, journeys, and pain points with respect to 988 services for users, crisis counselors, and others providing services to end users.
3. and how the opportunities interrelate with each other.

Vibrant would like to use the Human-Centered Design approach to surface these opportunities and to ensure consistent user experiences. In addition, Vibrant seeks to apply insights from user research to define functionality, including user stories, as well as operational, business, functional, technical, data and integration requirements. Additionally, conducting routine, iterative usability testing to continually improve the user experience and to inform content, information architecture, design, functionality, and accessibility is also of significant interest (as is, iteratively applying insights gathered to inform design and development).

As noted above, Human-Centered Design (HCD) is the process Vibrant is seeking to use in order to understand and provide more equitable and trauma informed services to people of all experiences across the lifespan reaching out to the 988 Suicide & Crisis Lifeline (988 Lifeline). We also seek to focus on populations at high risk of suicide including but not limited to: LGBTQI+, American Indian/Alaska Native, rural individuals, individuals with mental illness and substance use disorders, Black/African-American youth, and older men. We expect the HCD process will work directly with users, crisis counselors, state and federal partners, and Vibrant employees to collaboratively understand the context of their work and engagement with the 988 Lifeline, as well as the solutions we are creating to support them. Thus, the Contractor must employ HCD to understand what people need from a policy, product or service before beginning or engaging in further design work.



Through the RFP process, the goals of Vibrant Emotional Health are to:

- Deepen knowledge of user experience (UX) research and incorporate UX research and design into the current 988 Lifeline process. Vibrant is new to user research and needs to understand how to regularly conduct high quality user research to ensure that those reaching out to the 988 Lifeline receive services that are equitable, trauma-informed, and accessible.
- Explore and understand the cost-effectiveness and sustainability of insourcing or outsourcing UX work.
- Learn how to incorporate multiple UX research methods and triangulate UX research findings through multiple data sources (such as social media, Google analytics, online reviews/forums, etc.) which can increase the likelihood of developing a deep understanding of user goals/expectations, needs, journeys, and pain points.
- Develop and maintain a user panel for user research and publicly communicate the insights from these studies, including a description of how the changes resulting from UX research and usability testing have impacted 988 services.

## Vendor Qualifications

**Vibrant Emotional Health** reserves the right to remove from consideration any **Vendor** for any reason. The preferred minimum qualifications of Vendors for consideration are listed below:

1. Experience helping non-profit and/or civic organizations conduct UX research and develop formal UX research processes.
2. Highly collaborative team whose work will be focused on the overall benefit to the 988 Lifeline.
3. User researchers and service designers have existing subject matter expertise in suicide prevention, crisis counseling, trauma-informed care, mental health, and/or behavioral health.
4. Experience with and ability to use existing communication tools, such as Jira and Slack to interact with the Vibrant and 988 Lifeline teams
5. Experience conducting research with persistently harmed communities (i.e. populations at high risk of suicide including but not limited to: LGBTQI+, American Indian/Alaska Native, rural individuals, individuals with mental illness and substance use disorders, Black/African-American youth, and older men).
6. An agency DEI framework that articulates how it is incorporated into your work.



## Scope of Work

### User Experience (UX) Research & Design for the 988 Suicide & Crisis Lifeline

#### 1. Project Management and Planning

- a. Develop a project plan and timeline that outlines key milestones and deliverables.
- b. Hold a project kickoff meeting with Vibrant and 988 Suicide & Crisis Lifeline (988 Lifeline) leadership and key staff to align on objectives, expectations, roles, and responsibilities.
- c. Conduct regular check-ins with Vibrant and the 988 Lifeline to provide updates on progress, identify risks and challenges, and adjust the project plan as needed.
- d. As part of these check-ins, and when able, synthesize findings from research into key insights and actionable feedback for key leadership and staff to incorporate into the product roadmap.
- e. The contractor should be available for any follow up questions that come from product teams that may inform the design and development of their product.

#### 2. User Research

- a. Conduct initial user research to identify opportunity areas, assess goals/expectations, needs, journeys, and pain points with respect to 988 Lifeline services for users, and clarify how the opportunities interrelate with each other.
  - i. For each service journey identified in research, document the touchpoints a user interacts with when using the 988 Lifeline and where additional touchpoints could exist in any channel (online via the website, on the phone, texting, or other). This should include a "happy path" as well as recovery paths when things go wrong. A related service blueprint will likely be necessary to understand impacts on end users.
- b. Conduct research with users, crisis counselors, state and federal partners, and Vibrant and 988 Lifeline employees to collaboratively understand the context of their work and engagement with the 988 Lifeline, as well as the solutions created to support them.
- c. Conduct iterative usability testing to continually improve the user experience of our products and services and to inform content, information architecture, design, functionality, and accessibility.
- d. Use multiple data sources, such as social media, Google analytics, online reviews/forums, secondary literatures, etc., to triangulate UX





research findings and/or develop a deep understanding of user goals/expectations, needs, journeys, and pain points.

- e. Define functionality, including user stories, as well as operational, business, functional, technical, data, and integration requirements based on insights gathered from user research.
- f. Ensure that all design decisions are made with the end-user in mind and, in collaboration with clinical and equity experts at Vibrant, that the resulting solutions are equitable and trauma-informed.

### **3. Formal Process for Routine and Continuous UX Research and Usability Testing**

- a. Develop a formal process for routine and continuous UX research and usability testing that is sustainable over the short and long-term for Vibrant and the 988 Lifeline.
- b. Evaluate the cost-effectiveness and feasibility of developing an internal team versus continuing to work with external collaborators and recommend an approach or combination of approaches that is more sustainable over time.
- c. Identify staffing needs to ensure that the 988 Lifeline can continually conduct UX research and usability testing.
- d. Recommend potential university partnerships (e.g., internships) that can be leveraged to ensure that UX research and usability testing can be conducted on an ongoing basis.

### **4. Key Deliverables**

- a. A report summarizing the findings and insights from initial user research and usability testing.
- b. Documentation of research notes, findings, and analysis in a usable, searchable format accessible to all Vibrant and 988 Lifeline employees and contractors who need the knowledge.
  - i. Interview notes and recordings should be anonymized and locked/have access limited to preserve privacy but relevant employees should always have access if requested with a valid need to know as determined by the product owner.
  - ii. The format of documentation should evolve as the needs and understanding of the teams evolve throughout the project. The contractor is responsible for making sure the documentation is meeting the needs of the rest of the team.
  - iii. All source files should be made available to Vibrant and the 988 Lifeline. If the contractor uses any tools for documenting and/or synthesizing that require licenses that Vibrant and the 988 Lifeline do not currently have, the contractor will provide a





minimum of three licenses to allow for visibility and collaboration as needed.

- c. Development of key metrics in collaboration with Vibrant and the 988 Lifeline that will measure how well the products and touchpoints of the service are working in concert with each other to meet user needs across all 988 Lifeline services.
- d. A formal process for routine and continuous UX research and usability testing that includes staffing needs and potential university partnerships/internships.
  - i. Recommendations on whether to develop an internal team or continue to work with external collaborators, and a recommended approach or combination of approaches that is sustainable over time.

## RFP Process and Rules of Participation

### RFP Process

1. Questions. Substantive questions regarding the Scope of Work must be received by email before the date and time in the RFP Timeline on the cover page and by the RFP contacts listed on the last page of the RFP. Questions not timely received by the RFP contacts are not guaranteed a response. Emails sent to the RFP contacts must include the RFP Number as written in this document in the Subject Line.
2. Information session. This RFP does not include an Information Session. Please email RFP questions to the RFP contacts listed on the last page by Monday, May 29th, 2023 to receive a response.
3. Submission. Proposers shall submit the Proposal Package in PDF format by the time and date set forth in the RFP Timeline. Proposers must submit a Proposal by email to the RFP contacts listed on the last page of the RFP and the Proposer must require and receive confirmation of receipt.



## Anticipated RFP Timeline

Event	Due Date
Request for Proposal (RFP) Issued	May 15, 2023
RFP Questions Due from Vendors	May 29, 2023
RFP Questions Answered and sent to Vendor	June 2, 2023
RFP Responses due at Vibrant by 5pm	June 19, 2023
Evaluations of RFP Responses Completed	July 10, 2023
Design Challenges	Weeks of July 17th and 24th
Check References for Finalist	Weeks of July 31st and August 7th
Contract Award Announcement to Selected Vendor	August 14, 2023

**Vibrant reserves the right to modify this timeline at its sole discretion.**

## Proposal Format

### **Please include the following in your proposal:**

1. Cover Sheet. A cover sheet containing the following information:
  - a. RFP Title
  - b. Vendor Name and Address
  - c. Primary contact person within your organization for this RFP. Name, title, email address, mailing address, and telephone number.
  - d. Number of addenda received
2. Agency Qualification.
  - a. Provide a description of how your agency meets qualification criteria for this proposal.
  - b. Identify those on your team who will be involved with the project with brief biographies, role, and relevant experience.



3. Executive Summary. Provide a summary of no more than one page describing why your organization is best suited to support Vibrant and the 988 Lifeline in collaboratively designing and conducting initial user research and informing development of Vibrant’s formal process for routine and continuous UX research and usability testing.
  - a. Please also incorporate the following into your summary: your experience working with nonprofit healthcare organizations.
4. Vendor’s Background and Organization. In this section, provide the following information:
  - a. Number of employees
  - b. Organizational chart
  - c. Audited financial statement for the last 3 years.
  - d. Background of principals.
  - e. Recently completed similar size projects.
  - f. A copy of any licenses relevant to this project.
  - g. Duration you have been doing business in this service or product line.
5. References. Provide three (3) references from individuals external to your organization who are familiar with your organization’s ability to provide the services sought under this RFP.
6. Technical Proposal. The Technical Proposal must address all issues in the Scope of Work and include any other information you believe would be relevant.
  - a. Include a timeline for milestones through the delivery of a final solution.
7. Provide a detailed project cost proposal, including line item detail of equipment, labor, and all overhead and profit within the proposal.
8. Describe your organization’s approach to incorporating Diversity Equity, Inclusion, Belonging (DEIB) priorities into Vibrant’s 988 Lifeline user research projects.
  - a. Describe how DEIB priorities are evident in your organization.

## Evaluation

Vibrant will review, evaluate, and short list responses based on the below criteria. Vendors may then be asked to provide virtual demonstrations of their solution. The award will be based upon the proposal that is determined to be in the best interest of Vibrant.



## Evaluation Criteria

Vibrant Emotional Health will be reviewing each RFP Response in accordance with evaluation criteria deemed critical to the success of this project. Please refer to the following criteria:

1. Project Understanding, adherence to RFP Instruction, & Response to Scope. (10%)
2. Organization Information, Qualifications, Certifications, and References. (15%)
3. Detailed Project/Implementation Overview & Approach (25%)
4. Vendor's DEIB approach and/or Certified Small/Minority/Women Owned/Locally owned Business Enterprises. (20%)
5. Total Cost. (15%)
6. Design Challenge (15%)

## No Contractual Relationship

Nothing contained in this RFP creates, nor shall be construed to create any contractual relationship between Vibrant and any Vendor. Vibrant makes no commitment in or by virtue of this RFP to purchase any services from any Vendor. Nor does receipt of any Vendor's quotation place Vibrant under obligation to enter an agreement to purchase supplies/services ("Agreement") with that or any other Vendor. Such Agreement shall be in a form acceptable to Vibrant's legal counsel and shall be signed by both parties. The Vendor agrees, however, to incorporate its representations set forth in its response to this RFP concerning performance into the Agreement. Each response shall constitute an offer, which remains valid for a minimum period of 90 days after the submission date. Any response submitted by a Vendor is subject to review and negotiation by Vibrant's procurement manager and legal counsel.



## Vibrant Contact

Direct inquiries and proposals via email to:

Christopher (Chris) Drapeau  
Director, Research & Evaluation  
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CC:  
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