

**Community Health Advocates
Request for Proposals
FY 2012**

Community Health Advocates (CHA), an initiative of the Community Service Society (CSS), invites mission-driven organizations that serve the small business community to participate in this Request for Proposals (RFP). CHA anticipates awarding contracts to roughly 10 organizations, at an approximate amount of \$20,000 to \$60,000 per organization (or more if appropriate) over an 11-month period. These groups will provide education and assistance to small businesses in their communities regarding health care and health insurance. Eligible groups include, but are not limited to, local or ethnic chambers of commerce, merchant associations, trade associations, rotary clubs, small business development centers, business improvement districts, county- or city-run small business service centers, or community-based non-profits. CSS expects to announce awards on March 26, 2012 via the CHA website, www.communityhealthadvocates.org, and for organizations' contracts to cover the period of March 26, 2012 through February 28, 2013. **Project grants are contingent upon a State award to CSS and receipt of federal funding pursuant to a federal exchange establishment grant to New York State.** CSS will continue to seek funding for this project beyond February 2013.

In March 2010, the federal health reform bill (called the Affordable Care Act or ACA) was signed into law. Under the ACA, states have the option to establish a State-operated exchange, which is an organized marketplace to purchase health insurance. States also have the option of setting up a Small Business Health Options Program (or "SHOP" Exchange) to serve small businesses and their employees. New York State has already initiated work to establish both a consumer and a SHOP Exchange, and has funded CHA as a partner in this project. Under this grant, CHA seeks to establish a small business assistance program ("SBAP") to educate small businesses about the ACA, provide assistance to small businesses about health insurance, and help inform the design and development of the State's SHOP Exchange, **contingent upon the receipt of the funding described above.**

CHA already operates a pilot consumer assistance project, under contract with New York State, to help individuals get, keep, and use health insurance. Last year CHA served 28,000 New Yorkers from all parts of the state, in cooperation with the Empire Justice Center, the Legal Aid Society of New York, Medicare Rights Center, and 24 community-based organizations. CHA's 2011 annual report can be found at www.communityhealthadvocates.org. The SBAP envisioned by this RFP will be a sister program of the already-established CHA consumer assistance project.

The SBAP will operate under a "hub and spokes" model. As the "hub," CSS's duties include: program administration, funding and training organizations across New York State to act as front line advisors and advocates for small businesses, data collection and reporting, and quality assurance. CSS will also identify specialists with expertise in this field (e.g. an accountant) to provide training and technical assistance to the organizations funded under this RFP. The funded "spokes" organizations will conduct

outreach and training events to educate small business decision-makers about health reform and health insurance in general, and will additionally assist individual small businesses on a one-on-one basis with their health insurance questions and needs.

Eligibility Criteria

Applicants must be non-profit organizations, membership associations, local counties, or other mission-driven companies or organizations that serve small businesses in New York State. Examples of eligible applicants include (without limitation) local or ethnic chambers of commerce, merchant associations, trade associations, Rotary clubs, small business development centers, business improvement districts, county- or city-run small business service centers, or community-based non-profits. Selected applicants will provide services free of charge to small businesses.

Contingent on an award and receipt of federal funds as described above, CSS seeks to fund a network of organizations that serve diverse populations of small businesses, including but not limited to those from culturally, geographically, and/or linguistically isolated communities.

In compliance with federal Exchange regulations and/or the terms and conditions for Exchange establishment grant funds, CSS cannot fund:

- organizations or individuals that have a conflict of interest, such as individuals or companies that sell insurance or insurance-like products, including discount plans,
- activities for which the applicant is already compensated from another source,
- the provision of direct health care services, including outpatient and specialty visits with a provider, or
- the counseling of a consumer about whether or not a complaint or appeal is valid and whether it should or should not be filed (such cases can be referred to CSS).

Applicants must demonstrate financial viability to carry out CHA SBAP services based on information required in this RFP. In addition, any information deemed confidential or proprietary shall be specified as such by applicants. Should a proposal be accepted, however, all claims to confidentiality are subject to the terms of any prime agreement that may be entered into between CSS and New York State Department of Health governing CHA.

Applicants can submit a proposal as part of a collaboration or partnership of organizations. However, CSS will only contract with the lead organization of the partnership, and the lead organization will be responsible for meeting the terms of any contract.

Important Dates

<u>EVENT</u>	<u>DATE</u>
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Release of RFP	February 16, 2012
Questions About This RFP Due	February 29, 2012
Answers Posted	March 2, 2012
Bidders' Conference Call (attendance is optional)	March 2, 2012, 3:00 pm
Application Due	March 12, 2012
Award Announcements	March 26, 2012
Awardees Orientation and Intensive Training	March 29-30, 2012

Introduction

CSS has been a leader of public policy innovations for 169 years. CSS's mission is to promote policies that advance the economic security of low- and moderate-income New Yorkers by bringing their perspectives to the policy conversation. CSS's historic legacy also includes a specific focus on health care, which includes the establishment in 1863 of the Society for the Ruptured and Crippled, which is now known as the Hospital for Special Surgery.

Today, CSS operates the CHA consumer assistance program, which served more than 28,000 clients last year through one-on-one counseling sessions and educational workshops instructing clients how to sign up for, use, and keep health insurance. CHA is an "all-payer" program, helping people with public (Medicaid, Medicare, Family Health Plus, Child Health Plus) and private insurance as well as the uninsured. Since its inception in 1999, it has assisted more than 175,000 individuals. CHA works with a network of 30 community-based organizations throughout the State and offers services in 14 different languages. In addition to operating CHA, CSS's Health Initiatives Department is a lead grantee in the Health Care For All New York coalition (www.hcfany.org) and it issues policy briefs and reports on health reform and health coverage issues.

The SBAP envisioned by this RFP is a new program for CSS, building on the model employed for its successful CHA program. After training and with the support of CSS, organizations funded under this RFP will provide education and assistance to small businesses on issues such as the small business tax credits under the ACA; Healthy NY for small businesses; public coverage options; other small group options and commercial or job-based coverage options; how to understand and comment upon proposed insurance rate increases under New York's new prior approval law; how to choose a broker, and how brokers can help them; the pros and cons of HSAs and other small group products; and more.

Community Health Advocates

Organizational Structure

CHA's SBAP is composed of three types of organizations: CSS' central hub, CHA SBAP organizations, and SBAP specialists.

TYPE OF ORGANIZATION	RESPONSIBILITIES
Central Hub: CSS	Reviews and manages RFP process; program oversight and administration; central CHA website; technical assistance; quality assurance; development of educational materials and presentations; operation of CHA pilot consumer assistance project and live central helpline for consumers.
CHA SBAP Organizations	Provide individualized counseling sessions for small businesses; education and community presentations on health insurance and care; outreach; provision of unbiased advice as to full spectrum of coverage options; assistance with transitions in coverage; advocacy with accessing services; advice and assistance with understanding the process for and help with filing complaints and appeals; referral of individual consumer assistance cases to CHA, etc.
SBAP Specialists	Assist CSS with provision of technical assistance to SBAP Organizations; conduct trainings and presentations for SBAP Organizations and CSS; and accept referrals for complex cases as appropriate.

Range of Awards

This RFP seeks to identify and fund network organizations that serve small businesses throughout the State of New York, contingent on an award and receipt of federal funds as described above. The amount of the grant awarded to each organization depends upon the scope of work and services proposed by applicants. To receive full payment, grantees will be required to meet baseline numbers of community presentations and direct assistance cases as will be agreed by contract. Grantees will also be required to comply with other contractual requirements, such as attendance at meetings, trainings, and presentations, timely reporting, and delivery of quality services.

CHA anticipates awarding grants of \$20,000 to \$60,000 per organization over the 11-month period from March 26, 2012 through February 28, 2013.* Grants larger than \$60,000 will also be considered if an organization (or a consortium of organizations) demonstrates that a larger grant will support the SBAP's mission.

Typically, an organization that is awarded a \$60,000 grant may commit to reaching 450 to 600 small business owners or healthcare decision-makers during the 11-month contract period through a combination of one-on-one assistance and group meetings or presentations. As an example, an organization's \$60,000 grant may consist of the following baselines:

- 10 cases per month of one-on-one counseling or assistance to small businesses
- 3-4 presentations per month, reaching approximately 5 - 25 small business owners or healthcare decision-makers per session.

An organization awarded up to \$40,000 may propose reaching 150 to 250 small businesses during the 11-month contract period by conducting 2 presentations per month and not performing any one-on-one counseling or assistance.

An organization awarded more than \$60,000 may demonstrate that it serves a large enough community that it would need to commit more than one FTE to this project. Larger grants may also be provided to consortiums of multiple organizations that will work together to provide SBAP services.

These deliverables are only examples. Groups may propose methods for providing outreach, education, and direct assistance to small businesses which are different than the examples listed above. The SBAP is a new program, and CSS is eager to read the proposals submitted during this RFP process.

CHA SBAP Services

CHA SBAP organizations awarded funds pursuant to this RFP must complete a **mandatory two-day intensive training March 29-30 in Albany. Please bear these dates in minds when submitting a proposal.** CHA SBAP groups will receive regular monthly trainings and support from CSS and the SBAP specialists. SBAP organizations will then provide some combination of the following services:

- Community Outreach, Education, and Presentations: CHA SBAP organizations will publicize CHA services to its constituents and other community members, and will provide community presentations. These presentations are group presentations designed to educate small business owners and healthcare decision-makers about enrollment in – and rights and responsibilities with respect to – public and private health coverage, Exchanges, Health Care Reform and ACA

* CHA's current funding dictates that roughly 2/3 of this must be applied to the 4.5-month period between March 26 and August 14, 2013. The remaining roughly 1/3 of this funding is **contingent on an award of further funds** and will be distributed during the 6.5-month period from August 15, 2012 through February 28, 2013.

provisions, small business tax credits, the process for reviewing and commenting on proposed premium increases, other health insurance, and other health care related topics. Venues for these presentations may include but are not limited to: chambers of commerce, Rotary clubs, religious institutions, community centers or groups, health centers, community health care providers, social service organizations, schools, small business or other trade organizations, other unique locations, or the SBAP organization's own program sites. Presentation audiences may include small business owners, others who make health insurance decisions within small businesses (e.g. HR or Finance Managers), consumers and other advocates who serve small businesses. CSS will provide model presentation materials to all SBAP organizations. Organizations may also propose to educate constituent small businesses on these topics through other means with which they have had past success reaching this audience.

- Cases: CHA SBAP groups will counsel and assist small businesses on a one-on-one basis on health insurance issues. Examples of cases may include: helping a small business understand and access their health insurance tax credits under the ACA; counseling a small business as it chooses health insurance for the firm's employees; helping a small business review and submit comments about premium rate increases that apply to their insurance; or answering a small business's questions about its obligations under COBRA or under the ACA. The level of assistance and involvement in a case may vary depending on the circumstances. A case may involve providing basic information to a small business on what its coverage options are, or detailed help comparing plans. Assistance is to be provided in an accessible, culturally and linguistically appropriate manner, including options for telephone, web, email, mail, and in-person assistance.
- CSS expects that all SBAP organizations will be ready, willing, and able to collaborate with each other to identify trends and issues affecting small businesses within the health care and health insurance arenas in New York State.
- All SBAP organizations must be willing to provide services to any small businesses that seek their assistance in their service area. Membership organizations (such as chambers of commerce) must be willing to provide services under this contract on an equal basis to nonmember businesses.

CHA SBAP Grantee Requirements

Agencies selected to join the CHA SBAP network will be provided with a contract and handbook, which will outline the policies and procedures of the program. Generally, agencies should expect the following requirements:

1. Staffing and Presentations

All SBAP organizations will agree to designate, at minimum, one FTE for the program who will serve as the CHA Coordinator and will be responsible for:

- attending CHA meetings and presentations. Agencies will be expected to attend:
 - **an intensive in-person two-day training in Albany, on March 29-30**
 - **The intensive training is scheduled for only a few days after the awards are announced. Applicants must plan to be able to send appropriate staff to this training if awarded contracts under this RFP.**
 - Travel and lodging for this training will be at the expense of the organizations attending, and can be included in the proposed budget.
 - one other in-person meeting either at CSS or in Albany during the course of the contract;
 - Monthly webinar trainings;
 - Monthly SBAP check-in meetings either in person (for organizations in New York City) or via conference call (for organizations outside of New York City)
- remaining current on health policy as it pertains to the services provided;
- overseeing other CHA staff at his/her organization, including reviewing cases;
- collecting and reporting data as directed by CSS;
- coordinating with CSS to create and implement corrective action plans, as appropriate; and
- cooperating with CSS to ensure that any CHA staff at his/her organization is adequately trained and competent to provide services.

2. Reporting

All CHA SBAP organizations will agree to:

- collect and report data, via the user-friendly internet-based CHA database or another data-reporting system, about activities performed, small businesses served, health-related issues addressed, and services provided. Details regarding data required for reporting will be provided in the individual subcontract and handbook. CBOs must currently have computers with internet access, printers, telephone, and email;
- adhere to appropriate confidentiality procedures for providing direct assistance (especially the maintenance of appropriate records);
- cooperate with monitoring by CSS. Monitoring may include site visits, observations of community presentations, and reviews of assistance as reported through the database; and
- encourage consumer participation in any program evaluations, as deemed necessary by CSS. Evaluations may include consumer satisfaction surveys, presentation participant evaluations, and CHA SBAP organization surveys.

3. Performance Measures for Services

All CHA SBAP organizations must comply with the following:

- quality of services provided;

- quality of data entry that accurately and completely reflects services provided;
- continuity and appropriateness of staff and competence in providing CHA services;
- timely compliance with contractual requirements;
- timely data entry; and
- cost-efficiency.

4. *Feedback and Assessment*

All CHA SBAP organizations will agree to:

- provide feedback on consumer and advocate materials, presentations, and other special projects to advance CHA goals upon CSS's request; and
- participate in evaluations and assessments of CHA and its components on an as-needed basis.

Content of Proposal

All items listed in sections A – G below must be included in each proposal to be deemed complete. Proposals missing any component will not be considered.

A. Cover Form (Form Attached)

Complete and submit the cover form, signed and dated by: (1) the organization's Executive Director or (2) the President or leader of the organization's Board of Directors or governing board (and of the organization's fiscal conduit, if applicable). Include the organization's Employer Identification Number (EIN).

B. Letter of Commitment from the organization's Executive Director or President of the Board of Directors

C. Financial Statements & Legal Documents

- Proof of Not-for-Profit Status (if applicable): (501(c)(3) tax-exempt verification);
- A copy of the organization's previous year's audited financial statement and the board-approved operating budget for the current fiscal year;
- Health Care Provider Waiver: As noted above, CSS cannot fund the provision of health care services. However, if an organization's health care services are incidental to its primary activities and would not create a conflict of interest, it may be funded at CSS's discretion. Any organization that fits this circumstance should complete the health care provider waiver form attached to this RFP.

D. Proposal Narrative:

The proposal narrative will consist of two parts. Part A should describe the applicant's experience, and past and current activities; Part B should describe the applicant's

proposal for services to be provided under this contract. The entire narrative should not exceed 6 pages, double-spaced, 12-point font, with standard 1-inch margins.

- **Proposal Narrative Part A: Current Capacity and Population Served**

CSS seeks to understand applicants' capacity and the small business community that the organization serves. Please describe the applicant's mission and organizational structure, current major activities and service populations, and address the following questions:

1. What types of programs/activities does the organization offer to small businesses?
 - a. Does it currently conduct health insurance education and/or one-on-one assistance?
 - b. What types of health insurance issues does it help small businesses resolve (for example: education, enrollment or navigational assistance, grievances, appeals)? Describe the level of advocacy provided to small businesses (for example: education, advice, research, representation).
2. What other services or advice does the organization provide to the small businesses it serves (for example: assistance securing loans, networking events, tax preparation assistance, etc.)?
3. How many small businesses are served through these activities in a typical month?
4. Tell us about the small businesses you serve:
 - a. Geographic area
 - b. Typical size (e.g., number of employees, revenues, turnover, etc.)
 - c. Typical industry or industries
 - d. Typical income level of employees
 - e. Current health insurance coverage status of business owners and their employees
 - f. Racial, ethnic, or linguistic composition of the small business owners, their employees, and/or their customers
 - g. Owners, employees, or customers with disabilities, chronic health or other high medical needs (describe)
 - h. Sources of coverage or care used or sought by businesses' employees (e.g. employer insurance coverage, association coverage, other commercial or public coverage options, self-pay care such as direct payment to medical practices, hospitals, community health centers or free care clinics)
 - i. Other unique characteristics of the organization's service population (e.g. rural businesses, artists, LGBT populations, etc.).

- j. If applicant is a membership association, are services provided to nonmembers?
5. Describe how applicant organization reaches small businesses. Please list all that apply, including: walk-in, phone (hotline or direct line), website, direct mail, conferences, or email. Detail hours of operation.
6. Describe the organization's policy regarding confidentiality and protecting health-related information, as required under the Health Insurance Portability and Accountability Act (HIPAA). Please provide written policy, if any.
7. Are there any restrictions on the organization's ability to advocate freely and vigorously on behalf of small businesses? If so, please describe.
8. Can the organization report case data to funders in a timely fashion? Describe current data tracking capacity.
9. Describe any experience the organization has in advocating for systemic changes on behalf of the service population or constituency.

- **Proposal Narrative Part B: Proposed Services**

Please describe how the organization will provide services, to whom and by what means, if funded under this project. Please address the following:

1. Describe proposed service population and geographic scope
2. Deliverables and staffing:
 - Number of direct assistance cases it will handle per month
 - Number of community presentations it will conduct
 - Describe the staffing that will be dedicated to the grant to provide these services, including the background, experience, and current duties of any personnel already on staff who will deliver or supervise services under this project.
 - If the organization plans to hire staff if awarded this contract, please indicate.
3. Accessibility:
 - Does the organization have offices staffed during business hours? Are those offices convenient? How do small business owners access the organization's services?
 - Is the site accessible to people with disabilities?
 - Please list all office locations where SBAP services be will provided.
 - Describe if the organization is accessible via phone, email, web application, in person, etc...?
 - How will the organization make its SBAP services available to nonmembers who reach out for assistance or education?
4. Outreach:

- Please describe how the organization will market and do outreach for SBAP services.
5. Expansion / Enhancement of Services:
- Please highlight how funding under this RFP would allow the organization to increase, supplement, compliment, or improve services already provided.

E. Budget (1 page) & Budget Narrative (1-2 pages, double-spaced, 12-pt font, 1-inch margins)

The information requested in this section will be used to evaluate your proposal's cost-effectiveness, as compared to proposals from other applicants. CSS reserves the right to negotiate these terms with individual awardees.

- Propose a grant amount for the project period—typical 11-month grants will be \$20,000 to \$60,000.
- Provide a line item budget for an 11-month term, describing how the amount proposed will be used for this project. Include:
 - Personnel expenses (consistent with staffing listed above)
 - Other than personnel expenses
 - Note: Any equipment with a value over \$500 purchased with these funds must be returned to New York State at the end of the contract period.
 - In-kind or other organizational contributions
 - Travel to and lodging at the initial intensive training. We expect one room for one night at the conference hotel will cost roughly \$200, plus tax.
 - Travel to one other meeting which will take place either in Albany or New York City.
- Provide a detailed budget narrative. If you propose a significantly higher or lower cost as compared to the typical grant (see Range of Awards above) in relation to services proposed, explain the cost difference.
- Due to the structure of CHA's funding, roughly 2/3 of the grant must be distributed during the 4.5-month period from March 26 through August 14, 2012. The remaining 1/3 of the funding will **only be available contingent on the award of further funds to CHA**, and will be distributed during the 6.5-month period of August 15, 2012 through February 28, 2013. Submitted budgets should account for this funding schedule. For example, agencies can propose to front-load promotion and start-up expenses into the first 4.5-month period, or to provide a higher volume of presentations or cases during the initial 4.5-month period.

F. Statement of Independence (1 page, double-spaced)

If the organization accepts funding of any kind, including fees, commissions, contributions, or membership dues, from parties or organizations in the health care or health insurance industries (e.g. insurance companies, brokers, hospitals, drug companies, etc.), then please provide a statement of independence. In the statement, please describe any factors which could prevent the organization from providing unbiased and independent advice under this contract, or create the appearance of similar obstacles. Please also describe how any such problems could be mitigated.

If the organization does not accept any funding of any kind from parties in the health care or health insurance industries, then please provide a statement to that effect

G. Two Letters of Reference (not to exceed one page, single-spaced)

Each applicant must provide two reference letters from persons or organizations familiar with their organization and their work.

Evaluation Criteria

Capacity and Population Served: 60%

- Compatibility of organization's mission and activities with CHA and the SBAP
- Experience providing services like those sought in this RFP
- Diversity: The organization adds to the diversity of the CHA network (whether diversity of ethnic or linguistic populations served, diversity of geographic service area, diversity of sectors or industries served, etc.)
- Advocacy: organization's demonstrated ability to work with CHA to identify trends and problems
- Independence and ability to provide unbiased services and advice
- Reporting: organization's demonstrated ability to report services promptly

Proposed Services: 40%

- Population Served: organization's experience and plan to target the small businesses described in section D above
- Proposed number of cases and presentations and feasibility to achieve said goal
- Outreach: Organization's outreach plan strengthens CHA's recognition

Conditions

CSS reserves rights to postpone or cancel this RFP; reject all proposals; request additional information; negotiate with applicants individually; modify the number of awardees and dollar amounts of grants;

modify the time-period of grants; amend specifications; eliminate requirements; accept only those proposals that serve the best interests of the program; terminate subcontracts for poor performance or in the best interest of the program; and amend terms of subcontracts to serve best interests of the program. All organizations selected may be asked to provide evidence of general liability insurance and errors and omissions insurance upon signing a subcontract with CSS.

Funding for this program is currently secured only through August 14, 2012. Subcontracts awarded through this RFP covering the period of August 15, 2012 through February 28, 2013 are subject to the award and availability of funds provided to the State of New York by the United States Department of Health and Human Services through the federal Exchange Establishment grant and the approval of New York State Department of Health.

Questions

Questions about this RFP should be **emailed** by 5:00 pm on February 29, 2012 to Marva Kalish at mkalish@cssny.org. Responses to common questions will be posted on the CHA website, www.communityhealthadvocates.org, by 5:00 pm March 2, 2012.

Bidders' Conference Call

On March 2, 2012 at 3:00 pm CSS will host a bidders' conference call to field questions about this project and the RFP process. The phone number for the call is (559) 546-1000, and the participant access code is 397385#.

Instructions for Submission

Applicants should submit one proposal marked ORIGINAL and signed by the appropriate individuals (see Contents of the Proposal, Cover Form). Mailed proposals must be postmarked by March 12, 2012, and/or hand delivered proposals must be received by CSS no later than 5:00 pm on March 12, 2012. Proposals may be stapled but should not be bound. Please use 12-point font, one-inch margins and double spacing.

Proposals should be mailed or hand delivered to:

Samuel Salganik
Attorney / Skadden Fellow
Community Health Advocates
Community Service Society of New York
105 East 22nd Street, 8th Floor
New York, NY 10010

CSS also requires that all applicants submit their proposal electronically to CSS no later than 5:00 pm on March 12, 2012, *in addition* to mail or hand delivery. Emailed proposals should be sent to

Samuel Salganik at ssalganik@cssny.org. Attachments to emails to this address can be no larger than 5 megabytes. Consider sending multiple emails if required.

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Proposal Checklist
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- ___ Cover Form, signed and dated by organization's Executive Director or leader of Board of Directors
- ___ Letter of Commitment from the organization's Executive Director or leader of Board of Directors
- ___ Proof of Not-for-Profit Status, if applicable
- ___ Organization's board-approved operating budget for the current fiscal year
- ___ Organization's audited financial statement for the previous year
- ___ Proposal Narrative: (not to exceed 6 pages, double-spaced)
- ___ Proposed 11-month program budget (not to exceed 1 page)
- ___ Proposed program budget narrative (not to exceed 2 pages, double-spaced)
- ___ Attestation
- ___ Statement of Independence
- ___ Two reference letters (each not to exceed 1 page, single-spaced)
- ___ Health Care Provider Waiver, if applicable

**Community Health Advocates
Request for Proposals
Cover Form
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Please note that this form must be signed by the organization's Executive Director or equivalent operational leader (and fiscal conduit, if applicable) or the President or Leader of the Board of Directors or governing board (and the fiscal conduit, if applicable). This form and the entire original application are due by the due date indicated in the Important Dates section.

NAME OF ORGANIZATION:

Address:

Telephone Number:

Fax Number:

Email Address:

EIN: _____

EXECUTIVE DIRECTOR (or equivalent operational leader) print name and title:

Name: _____

Title: _____

Signature: _____

Date: _____

PRESIDENT OR LEADER OF BOARD OF DIRECTORS (or governing board) print name and title

Name: _____

Title: _____

Signature: _____

Date: _____

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Cover Form
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*****Only fill out this form if organization uses a Fiscal Conduit*****

FISCAL CONDUIT (if applicable):

Name:

Address:

Telephone Number:

Fax Number:

EXECUTIVE DIRECTOR (or equivalent operational leader) print name and title:

Name: _____

Title: _____

Signature: _____

Date: _____

PRESIDENT OR LEADER OF BOARD OF DIRECTORS (or governing board) print name and title

Name: _____

Title: _____

Signature: _____

Date: _____

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Attestation
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	Yes	No
Applicant abides by all Federal Equal Employment Opportunity regulations, including the Civil Rights Act of 1964 and the Age Discrimination Act of 1975		
Applicant abides by the Americans with Disabilities Act of 1990		
Applicant abides by the Rehabilitation Act of 1973		
Applicant will provide services that are linguistically and culturally appropriate		

I hereby attest that the above is true and accurate.

Name: _____

Title: _____

Signature: _____

Date: _____

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Health Care Provider Waiver Request Form
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Guidelines

All applicants that provide health care services or products, have legal or fiscal relationships with health care providers, or anticipate doing so during the contract period, must apply for a Health Care Provider Waiver by filling out this form. An example of an organization that might qualify for a waiver is one that provides outreach on health in the workplace and also provides free blood pressure screenings.

The prohibition against funding health care providers is meant to exclude agencies that are providers of medical care, or health services or products, except on an incidental basis. Requests for Health Care Provider Waivers should demonstrate that:

- a. the primary activities of the organization do not include provision of medical care, health services or products;
- b. limited provision of health care, services or products is performed as an incidental adjunct to the primary activities of the organization; and
- c. health care delivery performed by the organization through managed care or fee-for-service providers would not create a conflict of interest or potential for non-objective performance of CHA activities.

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Health Care Provider Waiver Request Form
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NAME OF ORGANIZATION:

1. Describe the organization's primary activities.

2. Describe the health care services or products that the organization currently provides or anticipates providing. If the organization has a fiscal or legal relationship with a health care provider, state the name of the provider and describe the relationship with the applicant organization.

3. Explain why the organization's provision of services or products or the relationship described in paragraph 2 will not create a conflict of interest or potential for non-objective performance of CHA activities.

Name: _____

Title: _____

Signature: _____

Date: _____