

**Community Health Access to Addiction and Mental Healthcare Project (CHAMP):  
New York’s Behavioral Health Ombudsman Program  
Request for Proposals  
September 30, 2022**

Through this Request for Proposals (RFP), the Community Service Society of New York (CSS), on behalf of the New York State Behavioral Health Ombudsman Office, invites non-profit community-based organizations to participate in New York’s independent health insurance ombudsman program for mental health and substance use disorder care, known as the Community Health Access to Addiction and Mental Healthcare Project (CHAMP). CHAMP educates and assists New Yorkers in accessing treatment and insurance coverage for substance use and mental health conditions. Through this RFP, CSS anticipates awarding three contracts to local organizations to provide direct assistance with health insurance and access issues to individuals in their communities as well as education and outreach about the availability of CHAMP services. Contracts will be awarded to organizations serving areas of the State that are not currently served by a CHAMP community-based organization.<sup>1</sup> **Organizations serving areas of New York State with racially and ethnically diverse populations and/or high rates of substance use disorder and mental health conditions are highly encouraged to apply.** The grant award is up to \$80,000 for a 7-month period during the first contract year (December 1, 2022 to June 30, 2023). In subsequent years, the grant award will be up to \$80,000 for a 12-month period (July 1 to June 30 annually). CSS expects to announce the award on November 8, 2022 via the Community Health Advocates website, [www.communityhealthadvocates.org](http://www.communityhealthadvocates.org). The contract is expected to begin on December 1, 2022 and end on June 30, 2023, with the expectation of renewal for a 12-month period subject to performance and New York State budget appropriations. **Project grant and dates are contingent upon a State award to CSS and receipt of State funding.**

In March 2018, Section 33.27 of the New York State Mental Hygiene Law was enacted to establish the independent substance use disorder and mental health ombudsman program, known as CHAMP. CHAMP is supervised by the Office of Addiction Services and Supports (OASAS), in consultation with the Office of Mental Health (OMH). OASAS contracts with CSS to administer CHAMP and provide services to consumers through a helpline and a network of non-profit organizations. CSS operates CHAMP in partnership with three specialist agencies: Legal Action Center, NYS Council for Community Behavioral Healthcare, and Medicare Rights Center. These specialist agencies provide technical assistance, training, and/or assistance to consumers and health care providers.

CHAMP currently has a network of five community-based organizations: Adirondack Health Institute (serving the North Country); Community Health Action of Staten Island (serving Staten

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<sup>1</sup> A map of the areas of New York State that are currently served by CHAMP community-based organizations is available at <https://www.cssny.org/programs/entry/champ>.

Island); Family and Children’s Association (serving Long Island); Family Counseling Services of Cortland County (serving parts of the Southern Tier); and Save the Michaels of the World (serving Western New York). CSS on behalf of the NYS Behavioral Health Ombudsman Office and the Specialist organizations seek to add three additional community-based organizations with experience reaching and assisting individuals with substance use disorders and/or mental health issues to the CHAMP network. Awardees will provide direct assistance to individuals, families, providers and advocates. They will also provide education and outreach to consumers who have substance use disorders and/or mental health conditions about the availability of CHAMP services and their rights to access care and to use their health insurance effectively. Organizations with experience providing OASAS and/or OMH-certified services is a plus.

CSS seeks to fund organizations that serve diverse populations, including but not limited to organizations that serve consumers from culturally, geographically and linguistically isolated communities, as well as organizations that serve people with mental and physical disabilities, people who are LGBTQ+, veterans, youth and young adults, pregnant and parenting persons, and other vulnerable populations, including individuals who are or have been involved with the criminal legal system. Organizations that have expertise doing outreach and providing healthcare information and assistance are also encouraged to apply.

### **Eligibility Criteria**

Applicants must be non-profit organizations, membership associations, or other mission-driven organizations that have demonstrated experience serving healthcare consumers with mental health and substance use disorder needs in New York State.

CSS will not 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; or
- the provision of direct healthcare services, including outpatient and specialty visits with a provider.

Applicants must be able to demonstrate financial viability to carry out 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 with CSS and approved by OASAS governing the Ombuds.

## Important Dates

<u>EVENT</u>	<u>DATE</u>
Release of RFP	September 30, 2022
Questions About This RFP Due	October 7, 2022
Answers Posted	October 12, 2022
Application Due	October 29, 2022
Award Announcements	November 8, 2022
Projected contract start date	December 1, 2022
Awardee Orientation and Two-day Intensive Training in Albany	2023 (exact date TBD)

## Introduction

The Community Service Society of New York (CSS) has worked with and for New Yorkers since 1843 to promote economic opportunity and champion an equitable city and state. Through a strategic combination of data-driven research, direct services, and people-driven advocacy, we ensure New Yorkers have the power to create change in their lives and the life of our city and state. CSS is committed to the goal of increasing access to quality, affordable health coverage as a means to improve individual and community health outcomes, promote health equity, and to ensure economic security. Working statewide with around 50 local community partners throughout New York, we provide consumer assistance to New Yorkers who need help, offer in-depth policy solutions to systemic problems, and to advocate for government support for needed health reforms.<sup>2</sup>

Organizations funded under this RFP will provide direct health insurance assistance to people with mental health and substance use disorders, as well as their families, providers, and advocates, to help them overcome insurance barriers to treatment. CSS and the Specialist organizations will provide intensive training and support as the organization ramps up. Services provided by CBOs may include: assessment of eligibility for health insurance and referral for enrollment into health insurance; assistance understanding insurance benefits; help finding in-network providers; assistance with insurance denials,

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<sup>2</sup> In addition to CHAMP, CSS operates several health insurance ombudsman programs including: the Community Health Advocates (CHA) program, New York's statewide consumer assistance program under the Affordable Care Act, which helps New Yorkers find and use health insurance; the CSS Navigator Network, which helps enroll New Yorkers into free and affordable health insurance statewide through the State marketplace; the Independent Consumer Advocacy Network (ICAN), New York's ombudsman program for people with Medicaid who need long term care; and more.

including filing insurance appeals and complaints; and more. Organizations funded under this RFP will also engage in outreach and educational activities to promote CHAMP services to help New Yorkers with substance use disorders and/or mental health conditions understand their health insurance rights.

Organizational Structure

CHAMP operates under a “hub and spokes” model and is composed of three types of organizations: CSS’s central hub; community-based organizations; and Specialist organizations.

TYPE OF ORGANIZATION	RESPONSIBILITIES
Central Hub: CSS	Manage and organize RFP process; oversee and provide administrative services; operate live central toll-free helpline for direct assistance to consumers and providers; provide technical assistance and training; perform data collection and quality assurance; develop educational materials and presentations; make program reports to policy makers, administrators, and the State on consumers’ experiences with the health insurance system as identified by helpline staff, Specialists, and community-based organizations.
Specialist Agencies: Legal Action Center, NYS Council for Community Behavioral Healthcare, Medicare Rights Center	Provide legal support, technical assistance, and training; assist with tracking of and advocacy on systemic issues; produce educational materials and trainings; advise network organizations on cases and take referrals of complex cases; assist network organizations through regular case review meetings; conduct periodic policy updates on relevant issues. Some specialists also provide direct services to consumers and providers.
Community-Based Organizations	Provide direct assistance to people with mental health and substance use disorders, as well as their families, providers, and advocates, to help them overcome insurance barriers to treatment. Provide education and outreach to consumers, providers, and family members about the availability of CHAMP services and their insurance rights.

### Services To Be Provided Under This Contract:

The organizations awarded funds pursuant to this RFP must complete a mandatory two-day intensive training, taking place either virtually or in Albany, and will receive regular monthly trainings and support from CSS and the Specialists.

The organizations will then be expected to provide the following services in an accessible, culturally and linguistically appropriate manner, including options for telephone, web, email, mail, and in-person assistance:

1. **Individual assistance cases:** Counsel and assist consumers individually on health insurance (e.g., Medicaid, Essential Plan, Child Health Plus, Medicare, employer- or union-sponsored or other commercial insurance) and healthcare access issues relative to substance use disorder and mental health care.

Examples of cases include:

- Helping consumers understand how to use and access their health insurance benefits.
- Resolving medical billing and debt issues.
- Identifying violations of state and federal mental health and substance use disorder parity laws and helping consumers and providers file appeals, complaints, and requests for information.
- Helping secure prior authorizations, access to specialists and out-of-network services, and hospital and prescription financial assistance programs when needed.
- Screening uninsured clients for insurance eligibility and assisting with or referring for assistance with enrollment into insurance.

The level of a network organization's assistance and involvement in a case may vary depending on the circumstances.

2. **Community Outreach and Presentations:** The organization will be required to provide community presentations designed to educate consumers, family groups, advocates, healthcare providers, and other stakeholders about CHAMP, how to secure payment and authorization of mental health and substance use disorder health services from a health insurance plan, and/or mental health and substance use disorder parity laws and other laws that protect consumers' rights to access those health services. Venues for these presentations may include but are not limited to: religious institutions, community centers or groups, health centers, community healthcare providers, social service organizations, schools, or the organization's sites.

Presentation audiences may include mixed audiences of consumers, family groups, advocates, and healthcare providers.

3. **Client Stories:** The organization will identify consumers who have benefited from the Ombuds and are willing to share their stories with the public and will submit their stories to CSS following CSS protocols. Clients' information may be de-identified.
4. **Sentinel function:** CSS expects that the organization will be ready, willing, and able to collaborate with other organizations in the network to identify trends and issues affecting individuals within the healthcare and health insurance arenas in New York State.

### Organization Requirements

The organizations selected will be provided with a subcontract and a Policies and Procedures Manual for the program. Generally, the agency should expect the following requirements:

#### *1. Staffing and Responsibilities*

The organization will agree to designate a Program Coordinator and will be responsible for:

- attending program meetings;
- remaining current on health policy as it pertains to the services provided;
- overseeing other program staff at his/her organization, including reviewing cases and monitoring presentations;
- collecting and reporting data as directed by CSS on a timely basis;
- collecting client stories during the contract period with appropriate media releases;
- coordinating with CSS to create and implement corrective action plans, as appropriate; and
- cooperating with CSS to ensure that any program staff at their organization is adequately trained and competent to provide services.

#### *2. Reporting*

The organization will agree to:

- collect and report data, via the cloud-based CSS database (Salesforce), about activities performed, consumers and employers served, health-related issues addressed, and services provided following CSS guidelines in the subcontract and Policies and Procedures Manual. Organizations must currently have computers with internet access, printers, telephone, and email;
- adhere to appropriate confidentiality procedures for health consumer assistance, including any applicable heightened confidentiality procedures for substance use disorder and mental health information;

- cooperate with monitoring by CSS, which may include site visits, observations of community presentations, and reviews of individual services reported through the database; and
- encourage consumer participation in any program evaluations, as deemed necessary by CSS, including client satisfaction surveys, presentation participant evaluations, and surveys.

### 3. *Performance Measures for Services*

The organization must comply with the following:

- provide high quality services;
- ensure that data is entered accurately and completely reflects services provided;
- ensure continuity and appropriateness of staff and organization competence in providing services;
- timely compliance with contractual requirements;
- timely data entry; and
- cost-efficiency.

### 4. *Feedback and Assessment*

The organization will agree to:

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

### Range of Award

The amount of the grant awarded to the organization is contingent upon an award to CSS and depends upon the scope of work and services proposed by applicants. CSS anticipates awarding grants up to \$80,000 for a 7-month period during the first contract year. In subsequent years, the grant award will be up to \$80,000 for a 12-month period.

Grants consist of two components:

1. Baselines, which refer to the numbers of individual assistance cases and outreach/training events the organization is contractually obligated to achieve on an annual basis -- typical baselines for existing sub-contractors are 100-200 direct assistance cases and 10-30 outreach events; and
2. Deliverables that include attendance at CSS meetings and presentations, timely reporting, and quality services.

The organization must meet both requirements to receive full payment.

An organization that is awarded an \$80,000 grant in the first 7-month contract period will typically commit to: (1) handling 100 to 200 direct assistance cases; and (2) conducting 10-30 outreach/training events. An organization awarded a smaller grant amount will typically commit to fewer deliverables.

**Evaluation criteria include:**

- **Mission:** The mission of the organization aligns with this program.
- **Diversity:** The organization itself adds to the diversity of the program network.
- **Capacity:** The organization will be ready to provide services upon receiving the award.
- **Population Served:** Organization’s plan to target consumers with substance use disorders and/or mental illness in need of CHAMP services in the sought coverage area.
- **Health Equity:** Organization demonstrates how it is addressing health care disparities and/or promoting health equity.
- **Outreach:** Organization’s outreach plan strategy and proposed number of outreach events.
- **Advocacy:** Organization’s demonstrated ability to identify and document systemic problems and to collect clients’ stories that can be shared with the public.
- **Reporting:** Organization’s demonstrated ability to report services promptly.
- **Casework:** Proposed number of individual cases and feasibility of said goal.
- **Sustainability:** The organization expressed willingness to work for the program’s long-term sustainability.

**Content of Proposal**

All items listed in sections A to F 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 sponsor, 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): (i.e., 501(c) tax-exempt verification);



- A copy of the organization’s most recent audited financial statement with the management letter from the auditors;
- A copy of the organization’s most recent CHAR500;
- A copy of the organization’s most recent IRS Form 990;
- Anti-discrimination attestation;
- Conflict of Interest attestation.<sup>3</sup>

**D. Proposal Narrative (not to exceed 6 pages):**

1. Background About Your Organization. Tell us about your organization’s mission and experience helping consumers and/or providers with substance use disorders and/or mental illness navigate their health insurance and/or healthcare-related issues.
  - a. Tell us about the consumers you will serve, for example:
    - Geographic area;
    - Population description, including: primary languages, race/ethnicity, and other unique characteristics of the organization’s service population (e.g. individuals in recovery, people with substance use disorder and/or mental illness, rural populations, veterans, formerly incarcerated, LGBTQ+ populations);
    - Health coverage, insurance, or care (e.g. commercial insurance; public insurance such as Medicaid, Medicare, the Essential Plan or Child Health Plus, hospital financial assistance) they use; and
    - Income status and sources.
  - b. Tell us about your organization’s experience conducting outreach:
    - Please describe how the organization will market and do outreach to consumers and providers about consumers’ rights and CHAMP, and otherwise promote services.
    - Please describe any media (including social media) experience your organization may have.
  - c. Describe the organization’s policy regarding confidentiality and protecting health-related information as required under the Health Insurance Portability and Accountability Act (HIPAA) and 42 CFR Part 2 regulations. Please provide copies of written policies, if any.
  - d. Are there any restrictions on the organization’s ability to advocate freely and vigorously on behalf of consumers? If so, please describe.

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<sup>3</sup> As noted above, CSS cannot fund organizations that sell insurance or insurance-like products, including discount plans, and/or provide direct healthcare services. However, if an organization’s healthcare 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 enclosed attestation.

- e. Does your organization have demonstrated experience reporting data about services provided to funders in a timely fashion? Describe current data tracking capacity.
  - f. Describe any experience the organization has in advocating for systemic changes on behalf of the service population or constituency. Describe any experience using clients' stories to advocate for systemic changes.
  - g. Describe any experience the organization has in reducing health disparities and promoting health equity in the community you serve.
2. Deliverables and staffing being proposed:
    - Number of individual assistance cases the organization will handle per year. 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.
    - Number of outreach/training events the organization will provide each year and the number of potential attendees at these events. Describe the target audiences for these events. 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.
  3. Accessibility:
    - Where will the organization provide individual assistance, and how will this assistance be provided?
    - Where will the organization provide outreach presentations?
    - Are sites where services will be provided accessible to most consumers by public transportation? If not, how will consumers access these services?
    - Are sites where services will be provided accessible to people with disabilities? What reasonable accommodations are made for people with disabilities so they may access services? Please provide copies of written policies, if any.
    - Describe if the organization is accessible via phone, email, web application, and in-person.
    - Please list all office locations and hours where in-person assistance services will be provided.
    - Describe your organization's language access plan.
  4. Sustainability:

- Please tell us about your organization’s ability to participate in sustainability activities like educating community leaders about the need for CHAMP services in your community.

**E. Budget (1 page) & Budget Narrative (1 to 2 pages)**

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 awardee.

- Propose a grant amount for the project period.
- Provide a line item budget for a 7-month term, describing how the amount proposed will be used for this project. It is anticipated that the first month of the contract period will be dedicated to ramp up activities, such as contracting, planning and hiring. The budget should include:
  - Personnel expenses (consistent with staffing listed above);
  - Other than personnel expenses; and
    - Note: Organizations may be required to return any equipment purchased with grant funds to New York State at the end of the contract period.
  - In-kind or other organizational contributions.
- Provide a detailed budget narrative. If you propose a significantly higher or lower cost as compared to the typical grant in relation to services proposed, explain the cost difference.

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

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

**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; 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. The organization selected will be asked to provide evidence of general liability insurance, workers compensation, disability, and errors and omissions insurance upon signing a subcontract with CSS.

**Organization subcontracts awarded through this RFP are contingent on the award and availability of funds provided by New York State.**

## Questions

Questions about this RFP should be **emailed** by 5:00 pm on October 7, 2022, to [ChampRFP@cssny.org](mailto:ChampRFP@cssny.org). The subject line should be CHAMP RFP Questions. Responses to common questions will be posted on the Community Health Advocates website, [www.communityhealthadvocates.org](http://www.communityhealthadvocates.org), by 5:00 pm on October 12, 2022.

## Instructions for Submission

**CSS requests that all organizations submit their proposal electronically to CSS no later than 5:00 pm on **October 29, 2022**. Emailed proposals should be sent to [ChampRFP@cssny.org](mailto:ChampRFP@cssny.org).**

The proposal should be signed by the appropriate individuals (see Contents of the Proposal, Cover Form). Electronic signatures are allowed. Please use 12-point font, one-inch margins, and double spacing, unless otherwise indicated.

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**Request for Proposals**  
**Proposal Checklist**  
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\_\_\_ Cover Form, signed and dated by organization's Executive Director or leader of its Board of Directors

\_\_\_ Letter of Commitment from the organization's Executive Director or leader of its Board of Directors

\_\_\_ Proof of Not-for-Profit Status (if applicable)

\_\_\_ Organization's board-approved budget and actuals for the current fiscal year

\_\_\_ Organization's most recent audited financial statement(s) with the management letter from the auditors

\_\_\_ Copy of the organization's most recent CHAR500 and proof of filing (if available)

\_\_\_ Copy of the organization's most recent IRS Form 990 and proof of filing (if available)

\_\_\_ Anti-Discrimination Compliance Attestation

\_\_\_ Conflict of Interest Attestation (if applicable)

\_\_\_ Proposal Narrative (not to exceed 6 pages)

\_\_\_ Proposed 7-month program budget (not to exceed 1 page)

\_\_\_ Proposed program budget narrative (not to exceed 2 pages)

\_\_\_ Two Letters of Reference (each not to exceed 1 page, single-spaced)

**Community Health Access to Addiction and Mental Healthcare Project (CHAMP)**  
**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) and 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:** \_\_\_\_\_

**Community Health Access to Addiction and Mental Healthcare Project (CHAMP)  
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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:** \_\_\_\_\_

**Community Health Access to Addiction and Mental Healthcare Project (CHAMP)**  
**Request for Proposals**  
**Anti-Discrimination Compliance Attestation**  
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	Yes	No
Organization abides by all Federal Equal Employment Opportunity regulations, including the Civil Rights Act of 1964 and the Age Discrimination Act of 1975		
Organization abides by the Americans with Disabilities Act of 1990		
Organization abides by the Rehabilitation Act of 1973		
Organization will provide services that are linguistically and culturally appropriate		

I hereby attest that the above is true and accurate.

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_



**Community Health Access to Addiction and Mental Healthcare Project (CHAMP)**  
**Request for Proposals**  
**Conflict of Interest Attestation Form**  
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**NAME OF ORGANIZATION:**

1. Describe the organization's primary activities.
  
2. Does the organization sell any insurance products or insurance-like products, including discount plans?
  
3. Does the organization receive any direct or indirect consideration from a health insurer? If yes, then please describe the terms and conditions for receipt of such consideration.
  - a. Explain why the organization's provision of services or products, or the relationship described will not create a conflict of interest or potential for non-objective performance of the ombuds program activities.
  
4. Is the organization a provider entity that provides direct healthcare services to consumers, including outpatient and specialty visits with a provider?
  
5. If applicable, describe the healthcare services or products that the organization currently provides or anticipates providing. If the organization has a fiscal or legal relationship with a healthcare provider, state the name of the provider and describe the relationship with the applicant organization.
  - a. Explain why the organization's provision of services or products, or the relationship described will not create a conflict of interest or potential for non-objective performance

of the ombuds program activities.

By signing below, I represent that the above statements are factually correct, and I am authorized to sign and bind my respective organization to the statements herein.

**Signature:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_