

REQUEST FOR PROPOSALS

for

NYC Benefits

from

The CUNY Research Foundation in partnership with The Deputy Mayor's Office for Strategic Initiatives and Human Resources Administration

Amended on August 12, 2022

****All sections that have been amended are highlighted in yellow.**

SECTION 1: TIMETABLE

SECTION II: BACKGROUND

SECTION III: SCOPE OF SERVICES

SECTION IV: FORMAT AND CONTENT OF THE PROPOSAL

SECTION V: ANTICIPATED PAYMENT STRUCTURE, SCHEDULE, AND CONDITIONS

SECTION VI: SELECTION PROCESS, CRITERIA, AND ELIGIBILITY

Appendices

Appendix A: Application Questions (*please apply online, these documents are only for reference*)

- Service Providers Application
- Technical Assistance and Backbone Providers Application

Appendix B: Budget Template Guide

SECTION I: TIMETABLE

A. Release Date of the Request for Proposals

July 26, 2022

B. Questions

All questions regarding this Request for Proposal (RFP) should be e-mailed to NYCBenefits@rfcuny.org by August 15, 2022. Both questions and answers will be shared with the RFP distribution list **in two installments** starting the week of August 1st through August 19, 2022.

C. Pre-Proposal Webinars

RFCUNY, The Deputy Mayor's Office for Strategic Initiatives, and HRA will host one pre-proposal webinar on Wednesday, August 17 at 11 AM EST.

D. Proposal Due Date and Submission Portal

Proposals are to be submitted by September 13, 2022. It is required that proposals are submitted ahead of the deadline in order to avoid technical difficulties. Proposals received after the Proposal Due Date and Time are late and cannot be accepted by CUNY.

Date: September 13, 2022

Time: 11:59 PM EST

Link to Online Submission Portal: on.nyc.gov/nycbenefits

E. Anticipated Contract Start Date:

Contracts will begin no later than 3 weeks after successful applicants are selected.

SECTION II: BACKGROUND

The COVID-19 pandemic created a health and economic crisis unlike anything seen in recent memory. While all New Yorkers suffered, some communities were hit harder than others. Though much of the city is turning the corner toward economic recovery, many New Yorkers continue to need the vital lifeline provided by government benefits, like low-cost health insurance, rental assistance payments, small business tax credits, food benefits and direct cash assistance.

This is why the Adams administration has committed \$250 million dollars annually – the first increase in over 20 years – to enhance the Earned Income Tax Credit (EITC). This investment, combined with Governor Hochul’s \$100 million one-time increase, will increase access to essential items like food, rent, and utilities for the 800,000 eligible New Yorkers and will supercharge New York City’s economic recovery.

The EITC expansion is just the beginning of this administration’s commitment to galvanizing resources across New York City to remove bureaucratic and technological roadblocks, to expand outreach efforts and leverage the power of community-based organizations to ensure that all New Yorkers get the support they and their families need.

NYCBenefits is a new, cross-agency, cross-sector effort to undertake a systematic approach to connecting hundreds of thousands of eligible New Yorkers to the billions of dollars of government benefits that are currently underutilized. Increasing the amount of government benefits distributed to individuals has multiplier effects on their communities, and, by extension, our city. We saw this during the pandemic when unemployment benefits bolstered workers, their families, and their neighborhoods by supporting small businesses and creating job opportunities.

NYCBenefits aims to ensure all eligible New Yorkers are aware of all of the supports available to them, that accessing those supports is easy and efficient, and that eligible New Yorkers enroll, and stay enrolled, in those support programs.

NYCBenefits will bring together the many City agencies and community-based organizations that inform and administer benefits programs by providing funding and enhanced collaboration and coordination to unify and fortify the social service benefits ecosystem.

By the Numbers: Examples of Key Benefits Opportunities

- 8,600 (1 in every 200) NYC children lost a parent or caregiver to COVID-19: many are eligible for Social Security Survivor Benefits.
- 30,000 NYC students experience homelessness and another 70,000 are housing insecure (doubled up with relatives, etc.).
- Every year, approximately 23% of Supplemental Nutrition Assistance Program (SNAP) recipients do not recertify and lose SNAP benefits (~123,000 New Yorkers).
- ~\$5 billion in Child Tax Credit (CTC) funds are available if all eligible New Yorkers file.
- There are 220,000 evictions every year – many of those being evicted are eligible for eviction prevention services.
- The number of eligible New Yorkers not enrolled in the following programs:
 - 300,000 Public Health Insurance
 - 70,000 Fair Fares
 - 230,000 Low-Income Energy Assistance Program
 - 150,000 Cash Assistance

While many agency and community stakeholders are involved in helping New Yorkers access benefits, the City relies on a disaggregated approach to benefits access that leads to inefficiencies in government, gaps in information for community-based organizations (CBOs), and frustrations for New Yorkers seeking benefits. The City is committed to fundamentally shifting how

accessing benefits works – both internally and with community-based partners – and aims to create an integrated system of support for the most impacted New Yorkers.

In this critical moment, we have the opportunity to co-create a comprehensive benefits system, in collaboration with partners inside and outside of government, that ensures that New Yorkers access benefits more effectively, efficiently, and with dignity and respect. Our vision is a system that will: effectively and efficiently connect New Yorkers to all of the benefits for which they are eligible; increase the amount of food, money and supports going into households and communities that need them the most; eliminate unnecessary bureaucratic barriers that take time, cost money and lead to false denials, frustration and distrust, and; make communities stronger and more resilient by investing in community-based organizations and the neighborhoods they serve.

To build this benefits access system, New York City’s leaders have committed to deeply invest in outreach, enrollment, case management, coordination, and collaboration. The Research Foundation of the City University of New York (RFCUNY) is proud to partner with the office of the Deputy Mayor for Strategic Initiatives (DMSI) and the Human Resources Administration (HRA) in this effort.

RFCUNY and the City’s goals for this community-based contracting awards program are to:

- Increase the number of New Yorkers enrolling and staying enrolled in all of the benefits programs for which they are eligible;
- Make access to benefits easier and more efficient;
- Improve benefits-related coordination among City agencies and between City agencies and CBOs;
- Expand the benefits access capacity of community-based organizations (CBOs);
- Leverage heretofore underutilized federal, state and city dollars for poverty alleviation and economic stability; and,
- Create a culture of dignity and respect for those that administer and receive government benefits.

The City’s robust vision will rely on community-based organizations (CBOs) as trusted partners and credible messengers in order to reach New Yorkers in need and shape a program that best responds to the needs of the communities they serve. The City is committed to co-designing the program and ongoing collaboration and coordination a in partnership with CBOs. Responses from more than 115 CBOs to a pre-RFP survey asking for information on what works and doesn’t work in the current system, areas of existing and increased need, and scope of work recommendations served as the foundation of this RFP.

RFCUNY, with support from and in collaboration with DMSI and HRA, seeks proposals from community-based organizations to expand access to benefits in the communities they serve through outreach, engagement, application assistance, and case management. Contract awards will vary from \$100,000 – \$350,000 each year for three years with individual amounts variable depending on the proposed scope and eligibility.

Who Should Apply?

Organizations that have long provided benefits access services to the communities they serve, that have an existing, robust structure and staff to provide those services, and who are interested in expanding that work by increasing their workforce and/or building out their systems are encouraged to apply. Those organizations that have identified new needs in the communities they serve, new sub-populations that they do not currently serve and/or new benefits programs to offer the communities they serve will be particularly competitive.

Organizations that are new to benefits access work are welcome to apply but are strongly encouraged to include a detailed plan for how their existing staff and structures can be expanded upon to enter benefits access work.

Organizations are permitted to subcontract with other non-profits under the auspices of this contract. The expectation is that the core work of the contract will be completed by the selected organization, but if there is work that will need to be subcontracted awardees will be allowed to do so. Please note, approval of subcontracts will be subject to review by the RFP Review and Selection Committees.

SECTION III: SCOPE OF SERVICES

RFCUNY, in partnership with DMSI and HRA, seeks to partner with CBOs that are trusted messengers in their communities to provide benefits access services.

In addition, contractors will leverage their on-the-ground knowledge and experience to inform the initiative, shape the tech tools, and track impact in order to adjust and adapt throughout the grant term to best meet the needs of New Yorkers. As such, all contractors will be expected to work in collaboration with one another and with RFCUNY, DMSI, HRA, and other City agencies throughout the grant term to report in on successes and challenges, promising innovations, and opportunities for policy change and advocacy, among other insights.

CBOs that qualify are eligible to apply for funding to be “**Service Providers**” or “**Technical Assistance & Backbone Providers**”. Contractors will be expected to focus their services in one or more of the following areas depending on the type of funding they apply for (more info is provided under the deliverable section):

- a) Expand existing benefits access capacity to reach a larger number of New Yorkers than are already well-served by the organization and/or connect current clients to additional benefits;
- b) Expand existing benefits access capacity to reach new/additional/different populations beyond those already well-served by the organization;
- c) Expand existing benefits access capacity to include new benefits programs not currently offered by the organization;
- d) Develop new/additional capacity focused on *keeping* New Yorkers currently well-served by the organization enrolled in benefits;

- e) Develop new/additional capacity to offer benefits access services for the first time as a complementary offering to other services provided by the organization;
- f) Conduct actionable user research to help service providers understand pain points and existing “time taxes” that cause New Yorkers to drop out of applying for resources and to identify opportunities for improvement;
- g) Develop and implement solutions that will decrease the amount of time individuals spend applying for or waiting to receive benefits, in partnership with government agencies and other CBOs;
- h) Provide technical assistance and training to CBOs engaged in benefits access work; and
- i) Support, expand or innovate benefits access in additional ways that may not be outlined above.

Beginning in **early October 2022**, RFCUNY seeks to contract with CBOs to provide benefits access services for New Yorkers for a period of **three (3) years**. CBOs applying to this RFP will be required to identify one or more of the above categories and submit a clear proposal for how they plan to meet the goals of the program and produce these deliverables.

The efforts described above will accomplish the following deliverables in pre-determined geographic and/or demographic communities of focus. **Below is a proposed set of universal deliverables.** Final deliverables will be communicated to contractors prior to the commencement of contracted work.

Deliverables for Service Providers:

Deliverable	Activities	Proposed Metrics
Community Assessment & Planning Document	Please provide a baseline assessment of the particular geographic and/or demographic community served by your organization, the challenges facing that community, and corresponding strategies that will be effective in encouraging enrollment in government benefits. This document should include: • Demographic data, pandemic health and economic impact data, and program services data for your catchment area and/or communities served. • Links to recent (last 1-3 years) community needs statements, reports, or other products of community engagement.	Completion of Community Assessment & Planning Document

	• A description of existing benefits-related services – types of services and number of staff – and opportunities for expansion and/or innovation with an infusion of financial and human resources. • A list/map of key community partners, neighborhood institutions, and high-opportunity areas for outreach. • Proposed workplan or schedule of activities.	
Launch a public education campaign geared towards enrolling eligible New Yorkers in benefits.	Activities <i>could</i> include: • Holding public events ranging from community forums to recruitment drives to benefits block parties. • Incorporating benefits access messaging into your organization’s existing services ranging from program intakes to food distribution. • Sharing benefits access messaging via social and other media. • Meeting eligible New Yorkers where they are by identifying natural places to incorporate education.	Metrics will be tailored to the proposed work plan, but <i>will likely</i> include: • # of benefits-related activities and events • # of unique New Yorkers engaged • # of referrals to benefits enrollment and renewals
Connecting eligible New Yorkers to benefits.	Each organization will design and implement a high-quality, targeted, and strategic plan to enroll eligible New Yorkers in public benefits. The strategy could include new enrollment, benefits renewals, and holistic case management to overcome barriers to access. This will be tailored to the organization’s own strengths, the benefits programs it targets, and to	Metrics will be tailored to the proposed work plan, but <i>will likely</i> include: • # of new clients contacted and enrolled in one or more benefits programs • # of existing clients enrolled in new benefits

	the geographic area and/or demographic community/communities it serves.	• % increase in clients successfully recertified for benefits without interruption in benefits • # of applications case managed • # of benefits dollars or services accessed
Work collaboratively with RFCUNY and the City to coordinate and co-design NYCBenefits activities and tools (open source online screening tools, city-wide call center) and develop best practices.	All contractors will be active members in a collaborative, learning community with fellow grantees, RFCUNY, DMSI, HRA, other City agencies, and non-profit and philanthropic institutions.	Our goal will be to innovate and improve the NYCBenefits program, share best practices and learn from each other. While we expect active participation by all contractors in and between convenings, we will develop a shared set of metrics for this learning community together.

Deliverables for Technical Assistance & Backbone Providers:

For organizations choosing to serve as backbone organizations for the initiative – those that will convene, support, and provide technical assistance to CBO grantee cohorts (10-15 CBOs per cohort):

Deliverable	Activities	Proposed Metrics
CBO Convenings	Activities <i>could</i> include: • Regularly convene CBO grantee cohorts (at least 4 times/year). • Develop convening format and materials that facilitate shared learning, opportunities for partnerships, create space for innovation and co-design, track progress, and build community. • Develop cohort communication platform for in-between convenings.	Metrics will be tailored to the proposed work plan, but <i>will likely</i> include: • Well-used cohort communication platform • New ideas/innovations developed • Evaluation surveys from participants

User Research Learnings & Evaluation	Provide user research into the target populations or select programs to understand users' pain points, opportunities for improvement, and insights for CBOs. Conduct one-on-one user research with target population according to industry best practices.	Metrics will be tailored to the proposed work plan, but <i>will likely</i> include: • Report of pain points and areas of opportunity in benefits access for select populations, programs, or CBOs • Before and after reports of service improvements • A report which highlights areas of improvements for government and CBO partners to reduce time tax on residents
CBO Support & Technical Assistance	Train CBOs in benefits programs that are new to them, share best practices and offer on-call support to the CBO cohort (10-15 CBOs).	Metrics will be tailored to the proposed work plan, but <i>will likely</i> include: • Draft plan/curriculum for trainings/convenings • # of CBO staff trained • # of new benefits programs trainings • # of hours dedicated to CBO support calls • CBO Quarterly/bi-annual evaluation surveys from CBO grantees • Participation in meetings with Coordinating Committee • Presentation of co-designed innovations to improve benefits access

NYCBenefits Resources for Contractors

DMSI and HRA will provide **resources – guidance, support and tools** – to facilitate high-quality and consistent achievement of goals including:

- Connect contractors to **programmatic and strategic supports** from relevant City agencies (HRA, DSS, HPD, DOF, et al), and funded Citywide CBO Providers;
- Hold a series of **kick-off meetings** with all contractors to provide further information including: NYCBenefits vision, goals and structure, contextual data, introductions to Citywide CBO Providers, and guidance on contract deliverables;
- Provide clear **templates and guidelines on contract reporting**;
- Provide a **common template for the planning document**, to be used by all contractors;
- Provide **benefits information** detailing benefits and populations of focus for contractor use;
- Provide **opportunities to work with** the Office of Community and Ethnic Media, to assist organizations in developing community-specific messaging and outreach materials;

- Organize **trainings** on specific benefits rules & regulations, best practices, tech tools (including AccessHRA), etc.;
- Provide a grants manager to field and respond to **questions and concerns about benefits-related activities and deliverables**;
- Provide **regular data updates** to help inform an organization's decision-making, tactics, or areas of focus; and
- Work with Citywide CBO contractors to organize **convenings** to encourage collaboration and coordination between community-based organizations, City Agencies, City Hall, and other contractors.

NYCBenefits Governance

The Deputy Mayor for Strategic Initiatives (DMSI) team will lead a NYCBenefits Coordinating Committee made up of key agencies across government that administer benefits programs, work with benefits-eligible populations, track benefits data and shape benefits policy. The Committee will meet regularly to help shape the program. External partners from the non-profit and philanthropic sectors will be engaged as key program and policy advisors on an ad hoc basis.

CBO partners that are awarded contracts through NYCBenefits will be convened regularly throughout the 3-year program term by 1-3 citywide CBOs. The citywide CBOs will be responsible for facilitating information sharing, collaboration, and partnership opportunities, sharing best practices, and facilitating feedback sessions. The Coordinating Committee and the CBO partners will come together periodically throughout the program term to learn from each other and participate in co-design sessions for the MyCity¹ tool and other NYCBenefits tools. The role of the Committee will be to refine NYCBenefits goals and Key Performance Indicators (KPIs), tackle data sharing and data tracking challenges, identify partnership opportunities and emerging best practices, troubleshoot problems, pilot innovative solutions, identify policy change opportunities, track progress, and when applicable adjust and adapt for optimum impact. CBO partners will be responsible for the implementation of benefits access goals and identified solutions and will be required to participate in regular convenings and co-design sessions.

The DMSI team will lead and make all final decisions for NYCBenefits. **Each participating City Agency and partner CBO will be responsible for providing a point of contact to the DMSI team and to be responsive for day-to-day programmatic and operational questions.**

SECTION IV: FORMAT AND CONTENT OF THE APPLICATION

Instructions: Applicants must provide all information required in the application, which can be accessed here, by September 13, 2022: **on.nyc.gov/nycbenefits**. For reference, a complete copy of the application questions will also be provided in Appendix A.

Questionnaire

¹ MyCity is a single one-stop-shop portal for all city services and benefits that the Mayor's Office of Technology and Innovation will be building. [Read more here.](#)

The application asks questions about your organization’s history with benefits access work, the communities and geographies you serve, and your organization’s reach, capacity, track record, and reputation.

Examples of questions include:

- A brief history of the organization’s benefits access work (programs and populations served), or, if your organization is new to benefits access work, details related experience and why it makes sense for your organization to create new benefits access capacity;
- Any relevant changes in the community you serve in the past two years and how your organization will address any new and/or greater needs;
- Details on any new or innovative methods of outreach and/or ongoing case management your organization would implement given additional resources;
- Your organization’s benefits access goals and how you will measure your impact (i.e. the # of people enrolled in benefits, # of people who stay enrolled in benefits, # of people enrolled in new benefits, # of days out of the hospital, # of days in a new job, etc.); and,
- How you will expand your capacity and what specific activities your organization will undertake to reach this goal.

Priority Populations, Benefits, and Geographies:

We are prioritizing the following populations, benefits and geographies:

Populations
NYC children who have lost a parent or caregiver to COVID-19
Unhoused individuals, especially young people and families with children experiencing homelessness or housing insecurity
Families with children
Mixed-status immigrant households and undocumented immigrants
Formerly incarcerated New Yorkers
Populations that are newly eligible for specific benefits because of the COVID-19 pandemic (please provide additional information about specific populations and related benefits)
Other populations and/or benefits that your organization has identified as opportunities for impact in your community (please provide data to explain the need)

Benefits
Social Security Survivor Benefits
Earned Income Tax Credit (EITC), Child Tax Credit (CTC)
Fair Fares
Supplemental Nutrition Assistance Program (SNAP), especially focusing on renewal
Public health insurance
Low-Income Energy Assistance Program
Senior Citizen Rent Increase Exemption (SCRIE) and Disability Rent Increase Exemption (DRIE)

Locations
Taskforce for Racial Inclusion & Equity (TRIE) neighborhoods (see the list here)

Proposed Budget

Additionally, you will be asked to submit a proposed budget for the contracted work. The budget template guide is provided in Appendix B. A link to the budget template worksheet is provided in the online application: on.nyc.gov/nycbenefits.

Organizations can apply for any dollar amount, but award amount decisions will be made based on proposals and at the discretion of the NYCBenefits Review and Selection Committees.

Deliverables for Service Providers:

- Up to \$250,000 per year for 3 years

Deliverables for Technical Assistance & Backbone Providers:

- \$200,000 - \$350,000 per year per year for 3 years

Required: Proof of 501(c)(3) status or contract with fiscal sponsor.

SECTION V: ANTICIPATED PAYMENT SCHEDULE AND CONDITIONS**A. Payment Schedule Year 1**

RFCUNY and The City of New York are committed to a contract structure and payment schedule that supports the financial health of contractors and recognize the challenges faced by organizations operating under a traditional cost-reimbursement model. As such:

1. **Start of contract period:** 25% of total payment amount for milestone 1: Planning Document
2. **March – April 2023:** 50% of total payment amount, upon successful completion of milestone 2 Mid-Year Report including data on progress to date
3. **October 2023:** Remaining 25% of total payment amount, upon successful completion of milestone 3: Final Report

Payment schedules for Year 2 and 3 will be decided upon completion of Year 1.

B. Failure to Meet Deliverables and Appeals Panel

DMSI and HRA will provide ongoing support to contractors to help them meet their goals, but if a contractor fails to meet the mutually agreed-upon deliverables in a timely manner, RFCUNY retains the right to discontinue contract funding. RFCUNY will notify contractors of the suspension of their contract no later than two (2) weeks prior to a scheduled disbursement, and contractors will retain the right to appeal this decision before an Appeals Panel that reflects the

programmatic and process expertise necessary to ensure a rigorous and thoughtful assessment of the appeal and the contractors' performance. The Appeals Panel will consist of three (3) members:

- Two (1) Mayoral appointee,
- Two (1) Nonprofit appointee, and
- One (1) RFCUNY appointee.

C. Monitoring & Evaluation

Central to the program is an ongoing monitoring and evaluation system that will assess contractor outputs and performance. RFCUNY, DMSI and HRA will aim to use this system to continually improve programming and improve outcomes. In responding to this RFP, all applicants should be aware that such a system will be in place and that all Contractors will be required to participate in activities from the City or their designees.

SECTION VI: SELECTION PROCESS, CRITERIA, AND ELIGIBILITY

A. Selection Process

RFCUNY, with support from a review committee made up of staff from city agencies and experts in the benefits access space will conduct an initial screening of all proposals; eligible and complete proposals will then advance to consideration by a selection committee compiled of subject matter experts and senior leaders in community, government, and philanthropy. This committee will reflect the programmatic and process expertise, appropriate demographic familiarity, and general citywide knowledge of nonprofits, community organizations, and public institutions, and more, necessary to guarantee a rigorous and thoughtful selection process.

B. Selection Criteria

CUNY, along with DMSI and HRA, has developed a selection criteria that will be transparent, easy to understand, and reflective of our commitment to fund community-based organizations that work with New Yorkers who are eligible and need benefits most. The criteria, metrics, and evaluation methodology described below is based off of the successful Complete Count Fund, which was developed by CUNY and Census2020 in 2019 and has been further refined in partnership with policy experts at HRA, DMSI, and The Mayor's Office for Economic Opportunity. Proposals will be evaluated based on the information provided in the application in accordance with the following criteria:

NYC Benefits Community Based Service Provider and Technical Assistance & Backbone Awards		
Criteria	Metric	Points
Contact & Reach	Primary neighborhoods served	20
	Primary demographics served	
	Linguistic and cultural competency of staff	
Criteria	Metric	Points
Value to Communities Served	Measurable and attributable success stories	40
	Ability to address challenges	
	Previous experience	
	Reputation and community support	
	Demonstrated ability to attract and keep funding (even if small amounts)	
Criteria	Metric	Points
Capacity & Proposal	Overall quality and specificity of proposed scope of work	40
	Benefits access goals and measurement	
	Ability to plan & co-design	
	Self-evaluation and metrics tracking	
Total Possible Raw Point 100		

Tiering Factors

The applicant pool will be divided into tiers according to the size of the organization, based primarily on the organization's budget with some consideration to capacity to manage additional staff. This initial tiering will ensure that each organization is only compared to others of a similar size.

Contact and Reach:

RFCUNY, DMSI and HRA have every intention to galvanize resources across New York City to remove bureaucratic and technological roadblocks and increase information to ensure all New Yorkers get the benefits they and their families need. RFCUNY, DMSI, and HRA seek to partner with groups that can reach, engage, and mobilize these communities in accessing benefits. We ask questions about geography, demography, and other traits. Organizations will be assessed by the quality of engagement in the target communities rather than the number of communities they engage with.

Recognizing the unique and essential role played by smaller organizations working with specific communities and populations, the grant application asks organizations to describe their overall reach. For example, smaller organizations with a deep connection to a particular historically disenfranchised community have the opportunity to score as well or better than larger organizations with wider but less targeted reach. In addition, we want to know an organization's cultural and linguistic competency in relation to the community it serves.

Values to Communities Served:

RFCUNY, DMSI, and HRA seek partnerships with organizations that have successfully engaged their communities and have experience in the strategies they propose to use for benefits enrollment, outreach and engagement. Evaluation of this category is holistic and includes looking at achievements in benefits access and verifiable successes. Therefore, organizations that are smaller and may have less experience with public or private grants would not be penalized for not having previously received City funding. The Selection Committee will also consider reputation, as evidenced by the support of neighborhood associations, community leaders, and other stakeholders.

Capacity and Proposal:

We seek to partner with organizations who are trusted partners in their communities and whose proposals contribute toward RFCUNY, DMSI, and HRA's shared goal of educating and mobilizing New Yorkers to enroll in benefits. Because of this, we ask questions about staff size to ensure that an organization has the ability to manage the staff, work, and financial resources necessary to execute their specific proposal. Additionally, we ask questions about the organization's benefits access goals, ability to plan and co-design, and experiences with self-evaluation and metrics tracking.

C. Eligibility

An organization may only apply if it has 501(c)3 status or the fiscal sponsorship of a 501(c)3 organization, such as, but not limited to:

- a health or human services organization (social services, mental health services, housing services, shelter, emergency food services, etc.)
- an issue-based advocacy organization (environment, workers' rights, LGBTQI+ rights, women's rights, racial justice, immigrant rights, economic justice etc.)

Organizations with 501(c)4 status, are **not** eligible for this contract.

D. Restriction

No portion of the funds received through award of a contract under this RFP shall be used for activities that take place prior to the start of the contract, or to advance religion or support sectarian activity, including religious worship, instruction, or proselytization. No portion of this money may support any political activity of any sort, including branding, co-branding, or suggestion of support for any candidate for any elected office, any ballot initiative or referendum, or any issue of broad public discourse.

APPENDIX A

SERVICE PROVIDER APPLICATION

NYCBenefits Application

The COVID-19 pandemic created a health and economic crisis unlike anything seen in recent memory. While all New Yorkers suffered, some communities were hit harder than others. Though much of the city is turning the corner toward economic recovery, many New Yorkers continue to need the vital lifeline provided by government benefits, like low-cost health insurance, rental assistance payments, small business tax credits, food benefits, and direct cash assistance.

This is why the Adams administration has committed \$250 million dollars annually – the first increase in over 20 years – to enhance the Earned Income Tax Credit (EITC). This investment, combined with Governor Hochul’s \$100 million one-time increase, will increase access to essential items like food, rent, and utilities for the 800,000 eligible New Yorkers and will supercharge New York City’s economic recovery.

The EITC expansion is just the beginning of this administration’s commitment to galvanizing resources across New York City to remove bureaucratic and technological roadblocks, to expand outreach efforts and leverage the power of community-based organizations to ensure that all New Yorkers get the support they and their families need.

NYCBenefits will take a systematic approach to resolving these issues by focusing on the individuals in need and the institutions that serve them. NYCBenefits aims to ensure all New Yorkers in need and eligible for a service are aware of the services available to them, that those services are accessible to them, that those individuals complete enrollment, and stay enrolled, in those services. NYCBenefits will also work with institutions by providing further structure and funding to unify and fortify the social service benefits ecosystem.

The deadline to submit this application is September 13, 2022 at 11:59 EST.

CONTACT INFORMATION

Organization's Name:

Headquarter Address:

Point of Contact Name and Title:

Phone Number:

Contact Email:

Does your organization have 501(c)3 status OR the fiscal sponsorship of a 501(c)3 organization?

- Yes - Our organization has 501(c)3 status
- Yes - Our organization has fiscal sponsorship of a 501(c)3 organization
- No (please note, only 501(c)3 or 501(c)3 sponsored orgs will be accepted.)

WHO YOU SERVE

Special Populations:

Please select ALL special populations that you work with from the list below

- NYC children who have lost a parent or caregiver to COVID-19
- Unhoused individuals
- Families with children
- Mixed-status immigrant households and undocumented immigrants
- Formerly incarcerated New Yorkers
- Newly eligible populations due to COVID-19
- LGBTQIA+
- Survivors of domestic or gender based violence
- Members of the disability community
- Seniors
- Other (please specify and provide data to explain need in next question)

Other populations served:

Race/Ethnicity

Please select ALL racial or ethnic groups that you work with from the list below:

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian/Other Pacific Islander
- White
- Hispanic/Latino

Service Provision – Borough

Please note ALL of the communities you currently provide services within from the list below. If you provide services equally throughout New York City, please select "city-wide".

- Bronx
- Brooklyn
- Manhattan
- Queens
- Staten Island
- City-wide

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Manhattan

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Lower East Side and Chinatown
- Morningside Heights and Hamilton Heights
- Central Harlem
- East Harlem
- Washington Heights and Inwood

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Bronx

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Mott Haven and Melrose
- Hunts Point and Longwood
- Morrisania and Crotona
- Highbridge and Concourse
- Fordham and University Heights
- Belmont and East Tremont
- Kingsbridge
- Parkchester and Soundview
- Williamsbridge and Baychester, Edenwald

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Queens

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Queensbridge and Astoria
- Jackson Heights
- Elmhurst and Corona
- Briarwood, Flushing South
- Kew Gardens and Woodhaven
- Woodhaven, Richmond Hill, South Ozone Park
- Jamaica and Hollis

- Queens Village
- Rockaway and Broad Channel

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Brooklyn

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Bedford Stuyvesant
- Bushwick
- East New York and Starrett City
- Sunset Park
- Coney Island
- Flatbush and Midwood
- Brownsville
- East Flatbush
- Flatlands and Canarsie

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) Neighborhoods

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- St. George, Stapleton, Port Richmond

Physical Locations

Please select the boroughs where you have a physical presence.

- Bronx
- Brooklyn
- Manhattan
- Queens
- Staten Island

Which type of funding are you applying for?

Please note, you may apply for any dollar within this range when you submit your proposed budget at the end of this application.

- Service Provision Funding (awards from 100K-250K)
- Technical Assistance or Backbone Provider funding (awards from 250K-350K)

If you do not receive the amount your organization requests in your proposed budget, would you still like to move forward with this award?

Award amount decisions will be made based on proposals and at the sole discretion of the Review and Selection committee.

- Yes

- No

Your Benefits Work in These Communities

Please provide a brief history of the organization's benefits access work (programs and populations served), or, if your organization is new to benefits access work, detail related experience and why it makes sense for your organization to create new benefits access capacity.

Benefit and Services Currently Provided

Which benefits do you most commonly link your clients to? Check ALL that apply.

- Supplemental Nutrition Assistance Program (SNAP)
- Women, Infants, and Children federal assistance program (WIC)
- Medicare
- Medicaid
- Supplemental Security Income (SSI)
- Cash Assistance
- Housing benefits
- Childcare benefits
- Utility Benefits
- Transit Benefits
- Unemployment Insurance
- Earned Income Tax Credit (EITC)
- Child Tax Credit
- Other (please explain in next question)

Other benefits currently provided

If you selected "Other," please use this box to share which type of benefits that refers to

Which benefits would you connect your clients to if awarded this funding? Check ALL that apply.

- Supplemental Nutrition Assistance Program
- Women, Infants, and Children federal assistance program (WIC)
- Medicare
- Medicaid
- Supplemental Security Income (SSI)
- Cash Assistance
- Childcare benefits
- Housing benefits
- Utility benefits
- Transit benefits
- Other (please explain in next question)

Other benefits you would provide

If you selected "Other," please use this box to share which type of benefits that refers to.

ORGANIZATIONAL CAPACITY

In this section, we are interested in learning more about your organization's capacity to both manage and successfully complete your proposed benefits access scope of work.

Full-Time Employees

How many full-time employees currently work at your organization?

Part-time or Temporary Employees

How many, if any, part-time or temporary employees work at your organization? Please provide their full-time equivalency (FTE).

Does your CBO have one or more staff primarily focused on benefits?

- Yes
- No

Please describe your organization's capacity to engage in culturally- and linguistically-competent benefits access outreach and case management work in your proposed communities. How does your organization's staff reflect/represent the communities you work in?

Please indicate the languages spoken by one or more of your organization's existing staff members who will work on this program?

Please check ALL that apply.

- Spanish
- Chinese
- Russian
- Bengali
- Haitian
- Korean
- Arabic
- Urdu
- French
- Polish
- Other (Please explain in next question)

Other languages spoken by one or more of your organizations existing staff members:

Briefly describe your agency's overall capacity to successfully fulfill your proposed deliverables, including administrative capacity, fiscal health, etc.?

Please refer to the RFP document for proposed deliverables.

CONTACT AND REACH

In this section, we are interested in learning about your reach in the communities in which you work. We are interested in both size and depth.

In total, how many unique individuals has your organization enrolled in benefits in the past 12 months?

Please share any relevant changes in the community you serve as a result of the pandemic and how your organization will address any new and/or greater needs.

Value to Communities Served

In this section, we are interested in learning more about your organization's accomplishments, particularly how they relate to successful engagement with the communities you propose to work in under this grant. No single measure is a requirement – you will not be penalized, for example, for not having previously received City funding. Taken together, though, your answers should demonstrate an ability to engage those communities most at risk of being underserved.

Measurable and attributable success stories

Please share recent success stories about your organization's work. We are particularly interested in any new or innovative methods of outreach and/or ongoing case management your organization has implemented.

Challenges

What challenges has your organization faced in enrolling eligible New Yorkers in benefits and how did you navigate them? What barriers to participation do you anticipate for NYCBenefits, and how will you overcome them?

Self-evaluation and Response

How does your organization improve its work? Do you have a system in place to evaluate your ongoing work and refine approaches based on lessons learned? If so, describe an example of this.

Community Co-Design: How does your organization involve clients and/or community members in its design of programs? How is feedback incorporated into your organization's future planning?

Metrics Tracking

What systems do you have in place for tracking and measuring outcomes and impact? Please describe them below, including any software programs you use.

Previous Funding

Has your organization previously received funding support from the City? If yes, please describe the type, amount of funding, when it was received, and the outcomes you delivered.

Benefits Access Goals and Measurement

What are your organization's current benefits access goals and how do you measure your impact? For Service Providers: e.g. # of people enrolled in benefits, # of people who stay enrolled in benefits, # of people enrolled in new benefits, # of days out of hospital, # of days in new job, For technical assistance & backbone providers: e.g. #of CBO staff trained, #of new benefit program trainings, etc.

Are there other ways your organization measures success?
Please share if applicable.

How does your organization coordinate and track progress of long-term goals?

What size team will you need to reach your case management and outreach goals?
Please include, and specify, full-time staff, part-time staff and volunteers.

Do you plan to subcontract?

- Yes
- No

If yes, please provide a brief summary on what work you plan to subcontract.

The expectation is that the core of the contracted work will be completed by your organization. If there is work that you believe will need to be subcontracted, please describe it here. Please note, approval of subcontracts will be subject to review by the RFP Review and Selection committee.

Please upload your proposed budget for contracted work.

Please provide links to documents such as community needs statements, reports, or other products of community engagement that might be helpful in this review process. Please also feel free to upload any letters of support from neighborhood associations, community leaders, and other stakeholders.

This is optional and at your discretion.

TECHNICAL ASSISTANCE AND BACKBONE PROVIDER APPLICATION

NYCBenefits Application

The COVID-19 pandemic created a health and economic crisis unlike anything seen in recent memory. While all New Yorkers suffered, some communities were hit harder than others. Though much of the city is turning the corner toward economic recovery, many New Yorkers continue to need the vital lifeline provided by government benefits, like low-cost health insurance, rental assistance payments, small business tax credits, food benefits, and direct cash assistance.

This is why the Adams administration has committed \$250 million dollars annually – the first increase in over 20 years – to enhance the Earned Income Tax Credit (EITC). This investment, combined with Governor Hochul’s \$100 million one-time increase, will increase access to essential items like food, rent, and utilities for the 800,000 eligible New Yorkers and will supercharge New York City’s economic recovery.

The EITC expansion is just the beginning of this administration’s commitment to galvanizing resources across New York City to remove bureaucratic and technological roadblocks, expand outreach efforts and leverage the power of community-based organizations to ensure that all New Yorkers get the support they and their families need.

NYCBenefits will take a systematic approach to resolving these issues by focusing on the individuals in need and the institutions that serve them. NYCBenefits aims to ensure all New Yorkers in need and eligible for a service are aware of the services available to them, that those services are accessible to them, that those individuals complete enrollment, and stay enrolled, in those services. NYCBenefits will also work with institutions by providing further structure and funding to unify and fortify the social service benefits ecosystem.

The deadline to submit this application is September 13, 2022.

CONTACT INFORMATION

Organization's Name:

Headquarter Address:

Point of Contact Name and Title:

Phone Number:

Contact Email:

Does your organization have 501(c)3 status OR the fiscal sponsorship of a 501(c)3 organization?

- Yes - Our organization has 501(c)3 status
- Yes - Our organization has fiscal sponsorship of a 501(c)3 organization
- No (please note, only 501(c)3 or 501(c)3 sponsored orgs will be accepted.)

WHO YOU SERVE

Special Populations:

Please select ALL special populations that you work with from the list below

- NYC children who have lost a parent or caregiver to COVID-19
- Unhoused individuals
- Families with children
- Mixed-status immigrant households and undocumented immigrants
- Formerly incarcerated New Yorkers
- Newly eligible populations due to COVID-19
- LGBTQIA+
- Survivors of domestic or gender based violence
- Members of the disability community
- Seniors
- Other (please specify and provide data to explain need in next question)

Other populations served:

Race/Ethnicity

Please select ALL racial or ethnic groups that you work with from the list below:

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian/Other Pacific Islander
- White
- Hispanic/Latino

Service Provision – Borough

Please note ALL of the communities you currently provide services within from the list below. If you provide services equally throughout New York City, please select "city-wide".

- Bronx
- Brooklyn
- Manhattan

- Queens
- Staten Island
- City-wide

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Manhattan

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Lower East Side and Chinatown
- Morningside Heights and Hamilton Heights
- Central Harlem
- East Harlem
- Washington Heights and Inwood

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Bronx

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Mott Haven and Melrose
- Hunts Point and Longwood
- Morrisania and Crotona
- Highbridge and Concourse
- Fordham and University Heights
- Belmont and East Tremont
- Kingsbridge
- Parkchester and Soundview
- Williamsbridge and Baychester, Edenwald

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Queens

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Queensbridge and Astoria
- Jackson Heights
- Elmhurst and Corona
- Briarwood, Flushing South
- Kew Gardens and Woodhaven
- Woodhaven, Richmond Hill, South Ozone Park
- Jamaica and Hollis
- Queens Village
- Rockaway and Broad Channel

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) - Brooklyn

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- Bedford Stuyvesant
- Bushwick
- East New York and Starrett City
- Sunset Park
- Coney Island
- Flatbush and Midwood
- Brownsville
- East Flatbush
- Flatlands and Canarsie

Service Provision - Taskforce on Racial Inclusion and Equity (TRIE) Neighborhoods

Please select all neighborhoods your organization currently services. If none, do not select any and move to the next question.

- St. George, Stapleton, Port Richmond

Physical Locations

Please select the boroughs where you have a physical presence.

- Bronx
- Brooklyn
- Manhattan
- Queens
- Staten Island

Which type of funding are you applying for?

Please note, you may apply for any dollar within this range when you submit your proposed budget at the end of this application.

- Service Provision Funding (awards from 100k-250k)
- Technical Assistance or Backbone Provider funding (awards from 250-350k)

If you do not receive the amount your organization requests in your proposed budget, would you still like to move forward with this award?

Award amount decisions will be made based on proposals and at the sole discretion of the Review and Selection committee.

- Yes
- No

Your Benefits Work in These Communities

Please provide a brief history of the organization's experience convening, training, and/or co-designing programs with CBO's around benefits access.

ORGANIZATIONAL CAPACITY

In this section, we are interested in learning more about your organization's capacity to both manage and successfully complete your proposed benefits access scope of work.

Full-Time Employees

How many full-time employees currently work at your organization?

Part-time or Temporary Employees

How many, if any, part-time or temporary employees work at your organization? Please provide their full-time equivalency (FTE).

Does your CBO have one or more staff primarily focused on benefits?

How many of your full-time employees are case managers for benefits access?

- Yes
- No

Please describe your organization's capacity to engage in culturally- and linguistically-competent benefits access outreach and case management work in your proposed communities. How does your organization's staff reflect/represent the communities you work in?

Please indicate the languages spoken by one or more of your organization's existing staff members who will work on this program?

Please check ALL that apply.

- Spanish
- Chinese
- Russian
- Bengali
- Haitian
- Korean
- Arabic
- Urdu
- French
- Polish
- Other (Please explain in next question)

Other languages spoken by one or more of your organizations existing staff members:

Briefly describe your agency's overall capacity to successfully fulfill your proposed deliverables, including administrative capacity, fiscal health, etc.?

Please refer to the RFP document for proposed deliverables.

CONTACT AND REACH

In this section, we are interested in learning about your reach in the communities in which you work. We are interested in both size and depth.

In total, how many unique individuals has your organization enrolled in benefits in the past 12 months?

Please share any relevant changes in the community you serve as a result of the pandemic and how your organization will address any new and/or greater needs.

Value to Communities Served

In this section, we are interested in learning more about your organization's accomplishments, particularly how they relate to successful engagement with the communities you propose to work in under this grant. No single measure is a requirement – you will not be penalized, for example, for not having previously received City funding. Taken together, though, your answers should demonstrate an ability to engage those communities most at risk of being underserved.

Measurable and attributable success stories

Please share recent success stories about your organization's work. We are particularly interested in any new or innovative methods of outreach and/or ongoing case management your organization has implemented.

Challenges

What challenges has your organization faced in enrolling eligible New Yorkers in benefits and how did you navigate them? What barriers to participation do you anticipate for NYCBenefits, and how will you overcome them?

Self-evaluation and Response

How does your organization improve its work? Do you have a system in place to evaluate your ongoing work and refine approaches based on lessons learned? If so, describe an example of this.

Community Co-Design: What is your organization's experience in leading co-design sessions? How is feedback incorporated into your organization's future planning?

Metrics Tracking

What systems do you have in place for tracking and measuring outcomes and impact? Please describe them below, including any software programs you use.

Previous Funding

Has your organization previously received funding support from the City? If yes, please describe the type, amount of funding, when it was received, and the outcomes you delivered.

Benefits Access Proposed Scope of Work

Please include a narrative on the proposed scope of work and contract deliverables you will commit to if you receive funding for this project. Additionally, when relevant feel free to address the below questions in your response.

1. How will you expand your capacity and what specific activities will your organization undertake if you receive funding?

2. What are new needs in the communities you serve, new sub-populations that you do not currently serve and/or new benefits programs you would prioritize if you received funding through this RFP?
3. If you are new to benefits access work, describe the current work - type of work, staff, infrastructure, partnerships, etc. that you will build on to offer benefits access services to your community.
4. For Technical Assistance and Backbone Providers, what resources, materials, trainings, etc. will you produce to support the CBOs in your cohort?

Based on your proposed scope of work, how would you measure impact? For Service Providers: e.g. # of people enrolled in benefits, # of people who stay enrolled in benefits, # of people enrolled in new benefits, # of days out of hospital, # of days in new job, For technical assistance & backbone providers: e.g. #of CBO staff trained, #of new benefit program trainings, etc.

Are there other ways your organization would measure success?

Please share if applicable.

How would your organization coordinate and track progress of long-term goals?

What size team will you need to reach your case management and outreach goals?

Please include, and specify, full-time staff, part-time staff and volunteers.

Do you plan to subcontract?

- Yes
- No

If yes, please provide a brief summary on what work you plan to subcontract.

The expectation is that the core of the contracted work will be completed by your organization. If there is work that you believe will need to be subcontracted, please describe it here. Please note, approval of subcontracts will be subject to review by the RFP Review and Selection committee.

Please upload your proposed budget for contracted work.

Budget template can be found in the RFP Appendix

Please provide links to documents such as community needs statements, reports, or other products of community engagement that might be helpful in this review process. Please also feel free to upload any letters of support from neighborhood associations, community leaders, and other stakeholders.

This is optional and at your discretion.

APPENDIX B: Budget Template Guide

The completed budget template should account for all costs associated with the strategy, outreach tactics, and activities described in the proposal. This guidance document will walk through the background and instructions for completing the template correctly.

Final Budget Determination

If your organization is recommended for an award, the final award amount may differ from the amount proposed in your budget, based on service targets and funding limits.

Deliverables and Contracting

Please refer to the RFP document for a list of proposed deliverables. Contract deliverables for Service Providers will take the form of benefits enrollment and outreach metrics, including but not necessarily limited to the number of new referrals, number of new benefits applications submitted, number of people engaged, new communities reached, etc. Contract deliverables for Technical Assistance and Backbone Providers may include but are not limited to the number of staff trained, number of new benefits program trainings, number of hours dedicated to CBO support calls, new ideas and innovations developed, etc. Please look at the “Scope of Services” section of the RFP for more examples of deliverables. Final deliverables will be determined through the planning document submitted (Milestone #1) by CBOs in partnership with RFCUNY, DM-SI, and HRA. Deliverables should be in the service of expanding existing benefits access capacity or developing new/additional capacity to offer benefits access services. All applicants will be required to provide **estimated** targets for funding what your organization believes it will need to achieve its proposal, including to outline the staffing and non-staffing resources needed by the organization.

As programming progresses, the Research Foundation of the City University of New York (“RFCUNY”), in partnership with the Deputy Mayor’s Office for Strategic Initiatives (DM-SI) and Human Resources Administration (HRA), will work with participating organizations to ensure that budgeted activities and deliverable targets are responsive to realities on the ground. This will allow for reallocation of budget and activities when needed, upon mutual agreement.

Budget Template Instructions

Applicants must complete all fields in the template that pertain to its proposal. Fields highlighted in green can be edited; all other fields are locked, will automatically populate, and must not be changed.

Personnel Costs: Salaried Employees

This program allows for organizations to apply for funds to cover the cost of personnel that are dedicated to benefits access services or assistance.

Any individuals hired specifically for this project must spend **no less than 50%** of their time **solely** dedicated to benefits access services or assistance. Existing staff or programs that will receive partial funding through this award must dedicate at least 10% of staff time to benefits access work or services.

Dedicated Salaried Employees for NYC Benefits Work			
	Staff Position 1	Staff Position 2	Staff Position 3
Salary			
Portion of FTE (%)			
Start Date			
End Date			
Subtotal	\$0.00	\$0.00	\$0.00
Subtotal of Salaried Workers	\$0.00		
% Fringe Rate			
TOTAL of All Staff	\$0.00		

Non-personnel Costs

Co-design & Planning Costs: These costs must directly relate to costs incurred by engaging with community members for the purposes of co-designing benefits services or related to the strategic, logistical or provision planning of benefits access service. This could include but is not limited to providing stipends to New Yorkers or staff who participate in focus groups, co-design workshops, and other participatory practices. This could also include costs for facilitators, materials, food, space, etc.

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