



# Welcome & Introductions

## An Intro to NYC Council Discretionary Funding

Co-Sponsored by:

Council Member Ari Kagan

District 47 Brooklyn

Fully subsidized by generous allocations from

New York City Council Members.



# NonProfit HelpDesk

A project of the Jewish Community  
Council of Greater Coney Island  
(JCCGCI)

[www.nphd.org](http://www.nphd.org)





# Jeri Mendelsohn, LCSW

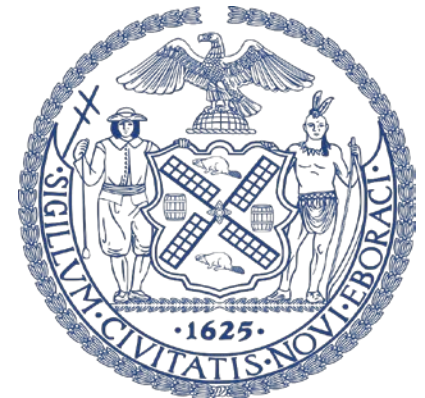
NPHD Capacity Building Facilitator



# Intro to NYC Council Discretionary Funding

Fully subsidized by generous allocations from New York City Council Members.

NPHD is a project of Jewish Community Council of Greater Coney Island (JCCGCI)



FUNDING PROVIDED BY



Department of  
Youth & Community  
Development



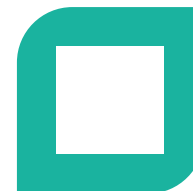
HOUSEKEEPING ITEMS



WHAT IS NYC COUNCIL  
DISCRETIONARY  
FUNDING?



IS MY AGENCY  
ELIGIBLE? IS MY  
AGENCY READY? IS  
THIS A GOOD PLAN  
FOR ME NOW OR, IN  
THE FUTURE?



STEPS TO PREPARE  
FOR SUCCESS!



Q&A

# Workshop Overview

# Housekeeping Items

To make this a productive workshop beneficial to all attendees, we ask the following:

- Keep yourself muted (bottom left corner of your screen)
- Update your screen name with First Name and Organization Name
- If you have a question, please use the "CHAT" feature or "RAISE" your hand feature.
- On the chat, include Name, position, email address and phone number
- Copy of this presentation will be provided by email after the workshop. Also, this workshop will be recorded for future reference.
- Be respectful to others. We are all here to learn and have a positive networking experience

# Discretionary Funding

AN INTRODUCTION TO  
NYC COUNCIL DISCRETIONARY FUNDING



## What is Discretionary Funding?

- Discretionary funding is money in the City's budget allocated to an eligible **not-for-profit** organization by the Council or a Member of the Council.
- This helps the City Council Members address local needs within their communities.
- There are specific Discretionary Funding Policies and Procedures that both Council Members and agencies need to follow.

## Transparency: What is It

- The NYC Council Discretionary Process is designed to ensure that NYC Funds are being used in responsible ways, for the public good.
- Organizations applying for funding need to be carefully vetted and able to establish or maintain a business relationship with the City
- Organizations need to demonstrate experience or capability to provide services to New York City residents.

## Examples of NYC Council Discretionary Funding

- Funds are used to support food distribution and hot meals programs
- To support affordable, accessible mental health
- To fund recreational and cultural activities
- Youth programming – sports activities, educational classes and Workforce Readiness Assistance
- Community legal assistance
- Funding to support Housing Justice, Immigration, and Civic Engagement programs and services
- Services to older adults including retired and senior volunteer programs
- Health Promotion Services

## What is the Vetting Process?

## What Does It Mean for My Organization?

All organizations  
Must pass a  
Vetting process  
**TO BE ELIGIBLE  
FOR FUNDING**

The Council has an extensive vetting process, which includes, but is not limited to the following:

- Not-For-Profit Business Records Searches;
- News article searches;
- Potential conflicts of interest;
- Tax Warrant database searches;
- Status as a not-for-profit entity;
- Compliance with State Charity registration requirements or certification that the organization is exempt from the registration requirements;
- Active Federal Employer Identification Number (EIN) from the IRS;
- Current IRS tax exempt status;
- Past evaluations of contract performance by funders; and
- Review of Use of Funds and Public Purpose

What To Expect:  
The Path of Applying and Receiving Discretionary Funding has many steps & TAKES TIME



WHY  
SHOULD MY  
AGENCY DO  
THIS  
  
PRO'S

You are establishing your agency with good business practices that will help you now and in the future.

You are becoming more engaged with your Council Member and other civic-minded community members.

You have the possibility of obtaining additional resources that will help you do your good work.

You will become an approved vendor within NYC and will become eligible for other funding opportunities.

You will be prepared to apply for the NYS Grants Gateway, another important funding option.

The Power of the Vendex – a NYC evaluation form that shows how you performed your work. A good Vendex provides a record of your agency's performance that helps you compete for other funding opportunities.

You are working to set your agency up for success!

PLAN FOR SUCCESS:  
WHY MY AGENCY NEEDS TO TAKE A PAUSE BEFORE APPLYING -  
MAYBE NOT NOW – PERHAPS IN THE FUTURE

My agency is not a certified not-for-profit organization.

My agency has not yet filed an IRS Form 990 – the income tax form for not-for-profits

My agency does not have a CHAR 500

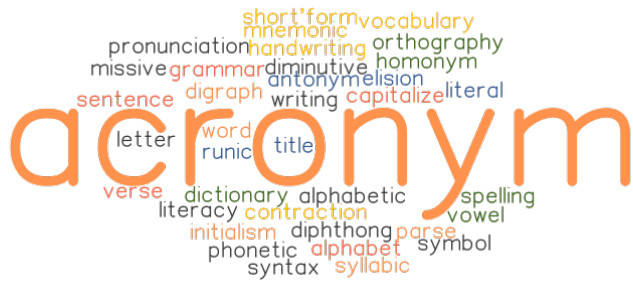
My agency does not yet have an Employee Identification Number.

At the current time, my agency does not have a budget, or income.

Ways in which  
an agency  
shows WHO  
THEY ARE and  
that they are  
eligible to  
receive NYC  
Council  
Discretionary  
Funds

- The agency has been incorporated as a not-for-profit organization by New York State. This includes 501 (c) 3, , 501 (c) (19), War Veterans Organizations, 501 (c) (4) Civic Leagues and Social Welfare Organizations, and Horticulture Organizations 501 (c) 5.
- The organization has a valid Federal Employee Identification Number – an EIN
- The organization has current registration with the NYS Attorney General’s Charities Bureau (a CHAR 500)





Acronym	
<b>MOCS</b>	Mayor's Office of Contract Services
<b>PassPort System</b>	Procurement and Sourcing Solutions Portal
<b>HHS</b>	Accelerator Health & Human Services Solicitation
<b>OMB</b>	Office of Management and Budget
<b>ACS</b>	American Community Survey
<b>PPB</b>	Procurement Policy Board
<b>COIB</b>	City's Conflict of Interest Board
<b>EIN</b>	Federal Employer Identification Number
<b>DCLA</b>	Department of Cultural Affairs
<b>CDF</b>	Cultural Development Fund

# PASSPort: Begins the Journey

- **Application for Pre-Qualification**

**PASSPort System – (*Procurement And Sourcing Solutions Portal*)**

- In Fiscal 2021, MOCS released the City's new digital Procurement and Sourcing Solutions Portal. **ALL** organizations receiving City Council funding must create and register an account at the link below. Under this new system, the Council's awards are combined accordingly and put into contracts. The contracts will then be managed electronically by both the agency and the organization through an online dashboard.

- For more details please visit:

<https://www1.nyc.gov/site/mocs/systems/about-go-to-passport.page>



<a href="#">System Login</a>	<a href="#">PASSPort</a>	<a href="#">HHS Accelerator</a>
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[About PASSPort / Create an Account](#)

## About PASSPort / Go to PASSPort

[Getting Started: Doing Business with NYC](#)

[PASSPort Login](#)

[PASSPort Highlights](#)

[Register NYCID](#)

[Learning to Use PASSPort](#)

[PASSPort Public Portal](#)

[Requirements Contracts](#)



About PASSPort

PASSPort Highlights

PASSPort FAQs

PASSPort Reports

PASSPort Public



# About PASSPort / Go to PASSPort

[PASSPort Login](#)

PASSPort, the City of New York's end-to-end digital procurement platform, manages every stage of the procurement process from vendor sourcing – who we purchase goods and services from (that's you – the vendor) to releasing and responding to solicitations (referred to as "RFx" in the system), and contract award, development, registration and management.

[Register NYC.ID](#)

The first step to getting started in PASSPort is to create your NYC.ID account. Click on "Register NYC.ID" to begin the process and check out the Getting Started: Doing Business with NYC for more detailed instructions on creating your PASSPort account.

[Procurement Navigator](#)

You can view contracting opportunities in the Procurement Navigator. No PASSPort account is required to search for solicitations on the Procurement Navigator. To respond to a solicitation, however, a PASSPort account is required. Note: The Procurement Navigator can be used from a smart phone.

[PASSPort Public](#)

PASSPort Public, a data transparency portal, provides unprecedented insight into PASSPort by making information at every stage of the procurement process available to the public. This tool is not designed for doing business with the City, but rather to drive procurement transparency and accountability.



Getting  
Started

Your First  
Steps

- **Requesting a Vendor PASSPort Account**
- Creating a vendor PASSPort account for your organization is a two-step process:
  - (1) **Registering a NYC.ID**, and
  - (2) **Submitting a PASSPort account request to MOCS for review.**

# Obtaining a NYC.ID

- **1. Registering a NYC.ID**
- Before creating a PASSPort account, please be aware that the vendor contact submitting the account request on behalf of the organization automatically becomes a **Vendor Admin** with full PASSPort account administrator privileges, including updating business information and adding additional system users and contacts to the account.
- The Vendor Admin receives all PASSPort email notifications at the email address that was used when submitting the PASSPort account request.

# Creating a PASSPort Account

- **Step 2: Submit a PASSPort Account Request.** Use the same email address that was entered when registering the NYC.ID to submit a PASSPort account request. For instructions, see the [Requesting a Vendor PASSPort Account](#) guide or watch this [tutorial](#). MOCS will send an email once the account request has been approved. You may now log in to PASSPort using your NYC.ID credentials to access your organization's PASSPort account.



An online portal where you can enter your organization's information, upload important documents and submit to get clearance to do business with the City of NY.



All organizations will be required to be prequalified, regardless of award amounts.



Application is valid for 3 years, as long as the organization submits proof on an annual basis within PassPort that they are in good standing with the Charities Bureau.

# HHS Pre- qualification



There are several categories of discretionary funding used by the City Council, each serving different purposes. The following categories developed through Council practice over the years and are subject to change in the future.

1. Member Local Initiatives
2. City Council Local Initiatives
3. Member Aging Discretionary Funds
4. Member Youth Discretionary Funds
5. Anti-Poverty Initiative
6. Citywide Initiatives

You can find these and other resources in the [Discretionary Funding Policies and Procedures Document](#)

## Discretionary Funding Categories

<sup>1</sup> For youth programs, services may only be provided outside of school hours. In-school programming must be funded through the Department of Education, with the agreement and consent of the principal(s) of the school(s) where services will be provided.

## **Applications for City Council Discretionary Funding will be released at the beginning of January 2024!**

- The funding is for FY 2025 (7/1/2024 - 6/30/2025)
- Fill out a NEW application each year
- Please note that if your organization is NEW and being funded for the first time, submit the following in addition to the standard forms:
  - Submit PASSPort & HHS Pre-qualification forms
  - Supplementary Form
  - Federal Employer Identification Number (FEIN) letter from the IRS.

## Discretionary Funding Application

Council.nyc.gov  
Fiscal Year 2025  
Discretionary  
Funding  
Expense  
Application  
to be released in  
the first week of  
January 2024!

- **Fiscal Year 2025 Discretionary Funding Expense Application Filing Period**
- *Will be released in the first week of January*
- Please be advised that all not-for-profit community-based organizations that wish to apply for discretionary funding for FY2025 must submit a Council Application. The FY2025 application will be posted on the Council's website at this location on **during the first week of January 2024** and the submission deadline will be on **Tuesday, February 20, 2023**.
- [Fiscal Year 2025 Discretionary Funding Expense Application](#)  
...
- <https://council.nyc.gov › budget › fiscal-year-2025>
- [Access Submitted and In-Progress Applications](#)
- Also, please note that if an application is not submitted within the filing period, the community-based organization will not be eligible for funding.
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# A Guide: Reference Documents and Websites

- Discretionary Funding Policies and Procedures - New York City Council
- <https://www1.nyc.gov/site/mocs/systems/about-go-to-passport.page>



# Engage Council Members

- City Council Highly Recommends
  - Confirm there is no additional supplemental forms requested by the Council Members office
  - Council Members want to see Organizational/Internal Capacity. Keep program/service delivery subcontract to a minimum
  - Funds are Reimbursement Based!
  - Engage with your Councilmember (all year)
    - Invite to site!!
    - Request a Conference Call if no meeting available
    - Email brochure of (or info about) services
    - Add them to your mailing (e-newsletter list)
  - Application Questions?
    - Contact City Council [discretionary@council.nyc.gov](mailto:discretionary@council.nyc.gov). If no response, contact your Councilmember

# Keep in Mind!

- Do NOT wait until 2/19/2024 to submit your application!
- The contact person on the application should be someone who checks emails regularly and able to provide organization information
- The Council has imposed certain restrictions on the awarding and use of discretionary funds. Must be inclusive of the general population.
- All newly created organizations (last two years – July 1, 2022) must submit a Council Supplementary Application form and a Federal Employer Identification Number issuance letter from the IRS.
- Organizations that have not received discretionary funding from the Council within the last three fiscal years may not receive funding in excess of \$50,000 total (and no more than \$25,000 from a single member). This restriction may be waived in exceptional circumstances. All exceptions will be determined on a case-by-case basis.





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