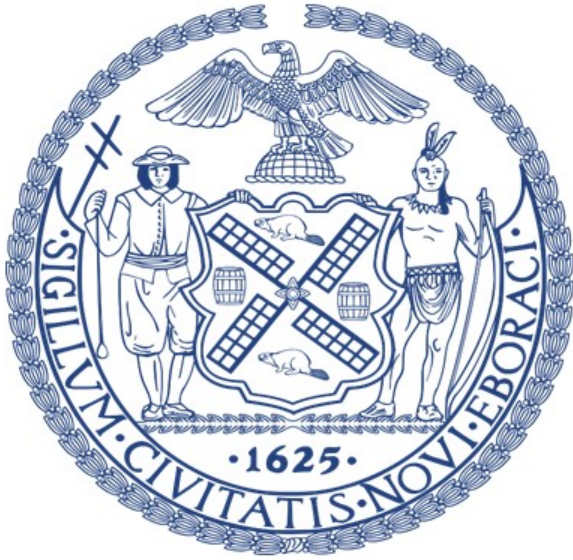# Welcome & Introductions

Council Member Farah N. Louis

District 45 – Brooklyn

NonProfit HelpDesk

A project of the Jewish Community Council of Greater Coney Island (JCCGCI)
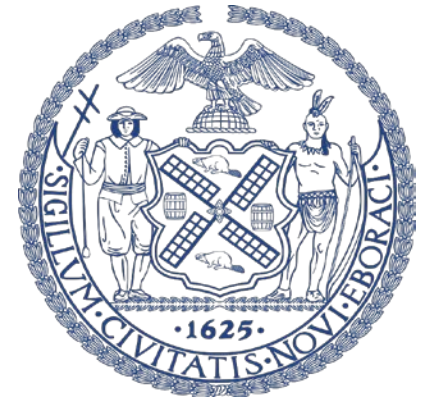
www.nphd.org

Jeri Mendelsohn, LCSW

NPHD Capacity Building Facilitator

Next Steps: For organizations awarded NYC Council Discretionary Funds

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

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

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

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Next Steps: For organizations awarded NYC Council Discretionary Funds

What is required for an organization to receive a contract, fulfill its requirements, and access funds!!

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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.

CONGRATS!!

- **How do agencies know if they have been awarded a NYC Council Discretionary Grant?**

- During each year's budget process, the Council and its Members assign discretionary funds to not-for-profit organizations and agency initiatives to meet needs and fill gaps in City Agency services and local projects.

- 1) Your organization submitted its Grant Request by February20, 2023.

- 2) Your organization may have received word from the City Council Member's office(s) awarding the grant.

- 3) Listed in the NYC Expense Budget, Schedule C

- 4) You may have received a letter from the NYC agency, i.e., DYCD, telling you that your agency was awarded a grant.

Discretionary Tracker

- **Discretionary Award Tracker**

- The Discretionary Tracker is a digital tool to search the status of all City Council Discretionary Awards from the past three fiscal years. The tracker is updated about every six weeks, after City Council votes on **transparency resolutions**. It will tell you your award, the amount, its status (cleared or uncleared and what NYC agency is administering it).

- For a comprehensive overview of the Discretionary Award Process, including the Procedural Requirements outlined below, please refer to the **Guide: Understanding New York City Council Discretionary Funding** and **Discretionary Checklist**.

- https://www.nyc.gov/site/mocs/opportunities/discretionary-award-tracker.page

- Get to know the NYC MOCS website – it is informative, current and will help guide you.

It is a long and winding road BUT, agencies do succeed, receive contracts, provide important services AND GET PAID.

Get Ready to Do Business → Show NYC Who You Are → Find Contracting Opportunities -NYC Council Discretionary Funding)

↓

Complete the Award Tasks ← If you are fortunate, you might receive notification of an award ← Respond to the Funding Opportunity – PASSPort, HHS Accelerator & Application

↓

Contract Gets Registered → Start Your Work → Complete Expenditures Forms

↓

Get Paid

WHERE DO I BEGIN??

- The Procedural Requirements for Award Clearance are as follows: Request a PASSPort Account, Submit an HHS Prequalification Application, and Receive City Council Clearance. Every discretionary provider must complete these before they can be cleared to begin contract registration. Organizations **are also required** to complete City Council's Capacity Building Training and obtain certification if they receive cumulative discretionary funding (per fiscal year) that amounts to **less than $750,000**.

- Please refer to the Webinar Recording: **Award Clearance for NYC Council Discretionary Funding** for detailed guidance on how to navigate the award clearance process.

- **Note**: There are some exemptions in regards to these requirements - for details please refer to our Guide: **Understanding New York City Council Discretionary Funding Guide**.

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

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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 thru an online dashboard.

- For more details please visit**:**
https://www1.nyc.gov/site/mocs/systems/about-go-to-passport.page.

- PASSPort is a web-based application. PASSPort works best when using Google Chrome internet browser on a desktop or laptop computer with internet access.

NYC
**Mayor's Office of
Contract Services**

वाश्ला ▸ Translate | ▼   Text-Size:

| 🏠 | About | **Systems** | Legal & Forms | Reporting | Partners | Contact | Search 🔍 |

System Login   **PASSPort**   **HHS Accelerator**

About PASSPort / Create
an Account

Getting Started: Doing
Business with NYC

PASSPort Highlights

Learning to Use PASSPort

Requirements Contracts

About PASSPort / Go to PASSPort

PASSPort Login

Register NYCID

PASSPort Public Portal

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.

HHS Accelerator

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

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

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The **HHS Accelerator** Prequalification Application contains two parts:

Business Application

Collects information to verify each organization's ability to establish or maintain a business relationship with the City

Service Application (at least one)

Gathers documentation to establish an organization's service experience and capabilities

Information about the HHS Application can be found in

HHS Accelerator Resources and Materials

Take the Capacity Building Training

- If the discretionary award tracker displays "Complete Capacity Building Training" when you search for your organization's awards, a member of your organization's board or executive staff must complete the Capacity Building Training for NYC Council Funded Nonprofits.

- Awardees that receive **$750,000 or more** in cumulative discretionary funding (per fiscal year) **are exempt** from completing City Council's Capacity Building Training.

- Awardees **are required** to complete City Council's Capacity Building Training and obtain certification if they receive cumulative discretionary funding (per fiscal year) that amounts to **less than $750,000**.

- The Discretionary Award Tracker will automatically reflect when an organization meets exemption from the training requirement. **The training must be completed by an officer or executive of the funded organization**.

- Once you complete the training, you will receive a certificate confirming that you have fulfilled the Capacity Building Training requirement. That certificate is valid for three years after the date of completion.

How do I sign up for the Capacity Building Workshop?

- Enroll in the online Capacity Building Training at **http://mocs.matrixlms.com** using code **UDKE-BQAO**. Please **refer to these instructions** for step-by-step guidance.

Required Documents that need to be submitted to finalize your contract.

- DYCD or your Contracting Agency's FY 2024 Budget
  All other contract documents required by budget line allocations can be found here as well. Please note: Discretionary Contracts are reimbursement based – i.e., you must prove funds have been expended to be reimbursed.

- Letter of Authorization and Board Resolution
  Samples for your reference. Originals of both the Authorization and Resolution (two (2) documents) must be on your organization's letterhead; signed and notarized.

- **Organization Letterhead**
- **Organization Address**
- **Organization Telephone Number**
-

- **AUTHORIZATION LETTER**

- RESOLVED, that [NAME AND TITLE], representing the Board of Directors of [NAME OF ORGANIZATION], does hereby authorize and direct:

  - [NAME AND TITLE],

  - [NAME AND TITLE], and

  - [NAME AND TITLE]

- to sign contracts, contract amendments, and other related contract documents, and to review and submit invoices on behalf of the Board of Directors of [NAME OF ORGANIZATION]. This Authorization Letter is valid during the tenure of the board representative(s) and the underlying signatories or until any of these individuals is removed or replaced, at which time [NAME OF ORGANIZATION] will provide The City of New York's contracting agencies with a new Authorization Letter. [NAME OF ORGANIZATION] may submit an addendum to this Authorization Letter if the sole change is to add a signatory.

- **Signature Specimens**

  - _____   _____

  - Printed name and title of authorized signatory   Signature of authorized signatory

  - _____   _____

  - Printed name and title of authorized signatory   Signature of authorized signatory

  - _____   _____

  - Printed name and title of authorized signatory   Signature of authorized signatory

- Signing on behalf of the Board of Directors of [NAME OF ORGANIZATION]:

  - _____   _____

  - Printed name of board representative   Signature of board representative

- **Notary Public**
  - State of _____
  - County of _____

    - Sworn to before me this ___ day of ____, 20___

    - _____

Required Documents To Be Submitted

- **Disclosure and Compliance Certification**
  This form must be included with your contract package; signed and notarized.

- **Training Certification** (for contractors who receive less than $1 million in City funding)

- **Certification of Client Abuse and Neglect**
  Requirement for all organizations regardless of the type of services provided.

- **Doing Business Data Form**
  This form is contract specific and must be completed with each City contract.

- **Sample Insurance Certificate DOE & NYCHA**

- **Sample Insurance Certificate General**

- **Certificate of No Conflict for NYC Employees**
  DYCD requires any Board Member who is also employed by any City Agency complete and return this form with the contract package.

Documents Needed for Your PassPort HHS Prequalification

- **Board of Director List**

- **Broker's Certification**

- **Budget Detail**

- **Conflict of Interest Disclosure Form**

- **Contract Attachment**

- **Fee Waiver (DYCD)**

- **General Liability Insurance**

- **Lobbying Certification Form**

- **Scope of Work**

- **Tax Affirmation**

Work Scope Details

MOCS ID (Ex. FY24 05210)	Purpose of Funds (Use exact language as NYC's Budget and Schedule C)	Program Services Describe in detail program daily operations (Ex. After School Program servicing students from 5-12 yrs. Old. Daily scheduled activities include Homework Help for 1 hour, STEAM activities for 45 min and Basketball/Swimming for 45 min. We play organized sports on Fridays.)

INITIATIVES

Select Funding Initiative – (The initiative(s) provided by Program Manager)
**Select all that apply, based on the initiative(s) approved on the latest cleared list

- **Age Group**
- Pre- K   Kinder/ Elementary School   Middle School   High School   Adult (18+)   Senior (62+)
- **Licenses**
- **SACC (School Age Child Care) Lic. #**   _____
- *List SACC license number for applicable programs (services to children) and any other applicable license and corresponding license number below:*
- **Other License:**   _____   **Lic. #**
:   _____
- **Scope of Services**
- **Neighborhood Wide   Borough Wide   City Wide**
- **Indicate Neighborhood.** *If "Neighborhood Wide" was checked, list which neighborhood(s) your programs occur in.* **(Ex.** Bushwick, Soho**):**   _____

Type of Event	
Event Contact Person	
Contact Telephone / E-mail	
Event Location / Description	
Estimated Participants	

ONE DAY EVENTS

Event Date: _____   Time: _____

Program Name	
Site Name (Ex. PS 128)	
Site Address	
Program Schedule Description (Brief description of program schedule)	

Projected Participant Enrollment	Projected Daily Participant Attendance (ADA)	Volunteers in the program (Y/N)

Start & End Dates, Days of the Week and Hours the program is in session*
* If programs are drop-in, by appointment or irregular, ONLY indicate # of sessions/week and # of hours/week

Program Start Date				Program End Date			
# of hours per week				Sessions per week			
Program Hours** (ex. 3 p.m.-6 p.m.)	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

PROGRAM SCHEDULE

Who are you Serving?

- Demographics

- Race and Ethnicity Data

- Gender and Ages

- Where are you providing services?

- How many people do you intend to serve?

- **Important Tip**: These numbers will translate to your contracted levels of service. Your organization will need to meet 85% of these metrics to be in compliance.

How will your awarded funds be spent?
The Budget Narrative

- The Budget Narrative form found at the end of the Work Scope needs to reference every expense that you identified in your 2024 Budget.

- It will include:

- Personnel – Salaries, wages, fringes

- Non-staff services – Consultants, subcontractors, stipends, vendors, Fiscal Conduit

- OTPS – Supplies, Space costs, Travel, Utilities, Operational Costs

- Details of Personnel – Names & Titles, FT/PT

- Details of Operational Costs – Admissions, audits, awards, uniforms & T-shirts, printing & postage.

Subcontractors and Consultants

For more info: NYC DYCD

Tab – Get Involved

Section – Discretionary Contracts

A **Subcontractor** hired on a health and human service contract is hired to perform or directly deliver a part of the prime contractor's programmatic contractual obligations. This means that anyone dealing directly with participants, whether an individual or an entity, (ex: a STEM teacher that teaches a robotics class). Subcontractors are to be listed in the Subcontractor section the Budget. For each Subcontractor listed, upload a signed, notarized Subcontract Agreement.

Consultant
A consultant hired on a health and human service contract is often a subject matter expert and does not perform or directly deliver a part of the prime contractor's programmatic contractual obligations. This means anyone assisting the Provider and not dealing directly with participants (ex: a STEM curriculum developer). The services provided by the Consultant must be related to the program work scope described in the contract. Consultants cannot be salaried employees of the Provider. All consultants paid by the DYCD contract are required to be listed in this section. For each consultant listed, a signed and notarized Consultant Agreement must be attached to the budget. Consultants retained by a Provider must enter into a written agreement detailing the specific tasks to be performed. Consultant Agreements and invoices must be maintained by the Provider for at least six (6) years. Consultant invoices must include the following details: rate, hours, type of services, date of service, consultant signature, and approval by the Provider's Executive Director or his/her d

Doing Business with the City of New York – Getting PAID!!!

- To do business with the City of New York, organizations need to create a vendor account in the City's **Payee Information Portal** (PIP) (to get paid) and also in **Procurement and Sourcing Solutions Portal (PASSPort)** (for all other contracting actions, including completing vendor disclosures, finding and responding to contracting opportunities, signing the contract upon contract award, and much more). The Mayor's Office of Contract Services (MOCS) developed and maintains PASSPort.

- Learn more about PASSPort and contracting with NYC – visit the MOCS website: **Getting Started: An Introduction to Doing Business with the City of New York**

- To view contracting opportunities, visit the **PASSPort Public Portal**.

- Need Help or Have a Question?

- For assistance with **PIP**, please refer to the **PIP website**.

- For **PASSPort** learning resources, visit **MOCS Learning to Use PASSPort**. For technical assistance when using **PASSPort**, submit an inquiry to the **MOCS Service Desk** or type this address on your browser **https://mocssupport.atlassian.net/servicedesk/customer/portal/8**.
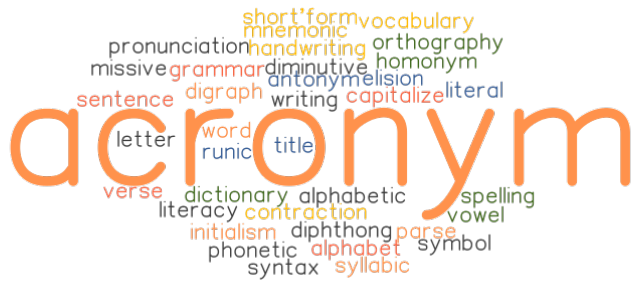
Acronym	
MOCS	Mayor's Office of Contract Services
PassPort System	Procurement and Sourcing Solutions Portal
HHS	Accelerator Health & Human Services Solicitation
OMB	Office of Management and Budget
ACS	American Community Survey
PPB	Procurement Policy Board
COIB	City's Conflict of Interest Board
EIN	Federal Employer Identification Number
DCLA	Department of Cultural Affairs
CDF	Cultural Development Fund

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

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An Intro to Discretionary Funding

NonProfit HelpDesk

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