



NonProfit
HelpDesk

2024-2025

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Introduction to Discretionary Funding:

February 11, 2025 / 6:00pm | FACILITATOR: TAMARA KESHECKI

TAMARA KESHECKI

Facilitator, Discretionary Funding



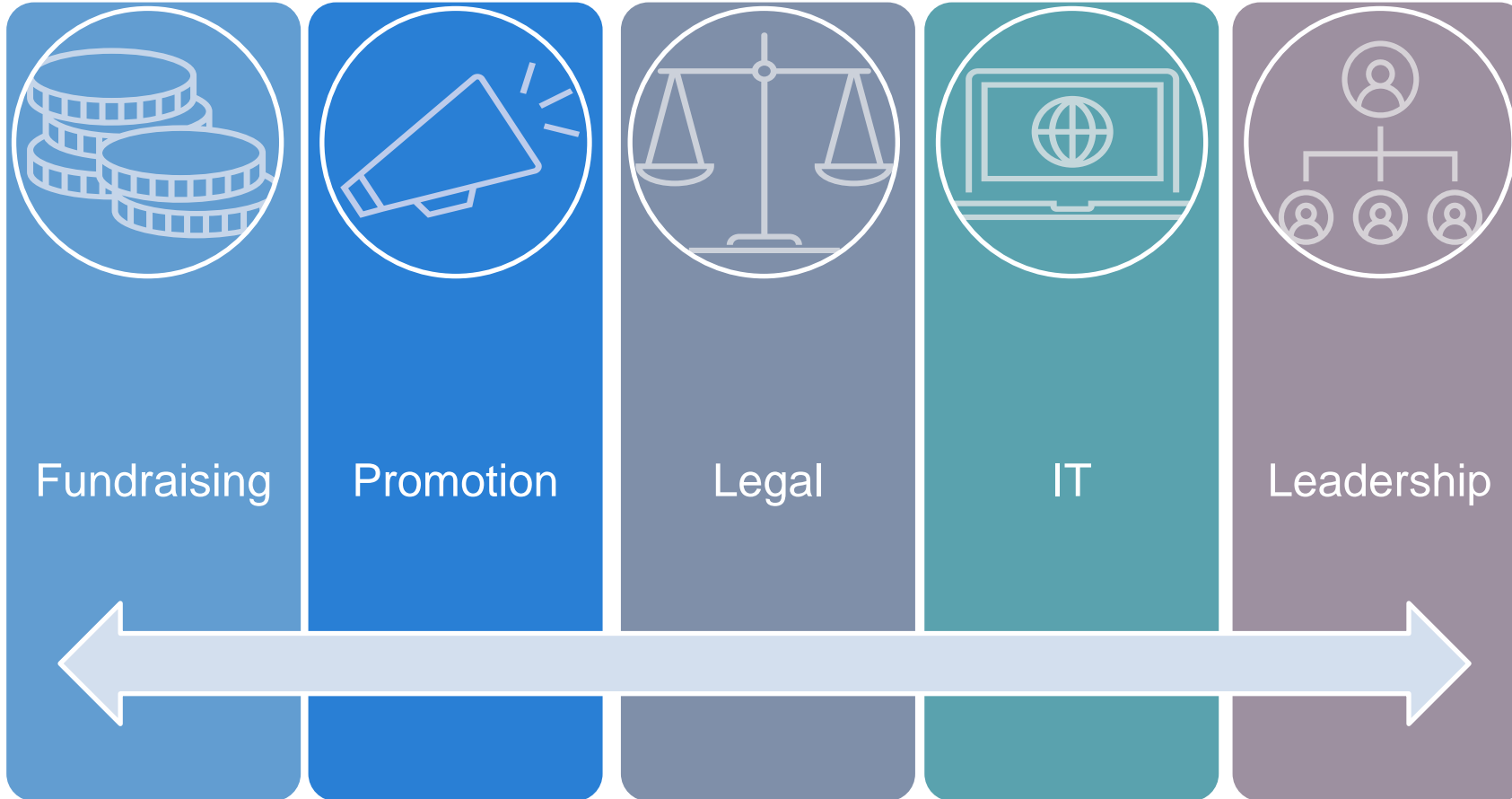
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Introduction to NYC Discretionary Funding

Co-Sponsored by:
Council Member Rita Joseph
District 40 Brooklyn



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Co-Sponsored by:
Council Member Crystal Hudson
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Co-Hosted by:
Council Member Shahana Hanif
District 39 Brooklyn



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Introduction to NYC Discretionary Funding:

The NonProfit HelpDesk and this technical support presentation series is funded through generous allocations from New York City Council Members including:

Speaker Adrienne Adams
Council Member Justin Brannan
Council Member Crystal Hudson
Council Member Farrah Louis
Council Member Ari Kagan
Council Member Inna Vernikov
Council Member Rita Joseph
Council Member Susan Zhaung





Each year, Council Members allocate discretionary funds to not-for-profit organizations to meet local needs and fill gaps in City agency services. Thus, discretionary spending is a critical tool in meeting the needs of our communities.

Duly appropriated sum of money in the City's expense budget allocated to **eligible not-for-profit** organizations by the Council or a Council Member.

Unlike competitively awarded Agency contracts, discretionary funding contracts are awarded for a single fiscal year.

Discretionary Funding Policies and Procedures

New York City Council



Discretionary funding is allocated **only** to not-for-profit, community-based social service providers.

Eligibility criteria:

- not-for-profit incorporation;
- current registration with the New York State Attorney General's Charities Bureau (unless exempt); and
- valid Federal Employer Identification Number (EIN).



- Not-For-Profit Business Records Searches
- News article searches
- Potential conflicts of interest
- Tax Warrant database searches
- Not-for-profit entity status;
- 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; and
- Review of organizations' use and public purpose of funds.



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Member Local Initiatives: Each Member and Borough Delegation receives and allocates an annual amount of discretionary funds, known as “local initiatives,” to meet the needs of their district, and Borough. Various factors including local needs, the Member’s request, and other considerations determine the allocation amount.

City Council Local Initiatives: Organizations may apply for funding directly to the Speaker, or Members may request that the Speaker fund an organization whose scope of services exceeds their individual ability to fund or serves a larger geographical area. This is often referred to as the “Speaker’s list.”

Member Aging Discretionary Funds: Each Member receives an annual amount to fund senior services in his or her district through the Department for the Aging.

Member Youth Discretionary Funds: Each Member receives an annual amount for the provision of services for youth or community development through the Department of Youth and Community Development. For youth programs, services may only be provided outside of school hours.



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Member Community Safety and Victim Services Initiative: Council Members receive an annual amount to provide programming and services that promote community/public safety and awareness. As well as to promote community fellowship, civic engagement and improved relations between law enforcement and the neighborhood.

Citywide Initiatives: The Council may also initiate programs to address community needs that it feels are not adequately met by existing agency programming, or to extend the reach of agency programs to underserved communities or populations. In most cases, the Council provides funding to specific not-for-profit providers. These initiatives are usually citywide in scope, although they may focus on high-need communities or populations. The method of allocating funding varies by initiative and is at the discretion of the Council.



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EXAMPLES

- Food distribution and hot meals programs
- Affordable, accessible mental health
- Recreational and cultural activities
- Youth programming: sports activities, educational classes and Workforce Readiness Assistance
- Community legal assistance
- Housing Justice, Immigration, and Civic Engagement programs and services
- Services to older adults including retired and senior volunteer programs
- Health Promotion Services



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Why Should My Organization Apply?

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

Become more engaged with your Council Member and other civic-minded community members.

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.

Learn how NYC PASSPort and NYC funding process works for future applications.

You are working to set your agency up for success!



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Reasons to Pause Before Applying

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

My organization has not yet filed an IRS Form 990 – the income tax form for nonprofit organizations.

My organization has not filed a NYS CHAR 500.

My organization does not have a Employee Identification Number.

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

My organization does not have the staff or financial capacity to manage a reimbursement grant.



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Discretionary Funding: What Steps Should My Organization Take to Apply?

PASSPort:

1. Get a NYC ID
2. Register on PASSPort
3. Apply for HHS Prequalification on PASSPort

City Council Discretionary Portal:

1. Register for an account on the City Council Discretionary Portal
2. Complete the application on the portal

Work with Council Offices:

1. Request a meeting with the Council Member(s) to which your organization is applying.
2. Contact each Council Member's office your organization is applying to and ask if they require any supplemental forms be completed.
3. Complete and submit supplemental forms as necessary.
4. Invite each Council Member to your site and/or events! Share the work you are doing in their community with them!



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About 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.

<https://www1.nyc.gov/account/register.htm>



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My organization does not have a PASSPort account. How do I set it up?



If your organization does not have a PASSPort account, you may **submit a vendor account request** on behalf of your organization. A NYC.ID is required to request a vendor PASSPort account.

If you use other New York City systems such as the City Record Online, you may already have an active NYC.ID (the email address and password you use to log in) and can skip the first step. Just make sure to inform your Vendor Admin of the correct email address so your Vendor Admin can use the same email address when adding you to your organization's PASSPort Vendor Profile>Contacts tab. PASSPort will require an exact match with your NYC.ID email address to confirm your access.

<https://www.nyc.gov/site/mocs/passport/about-passport.page>



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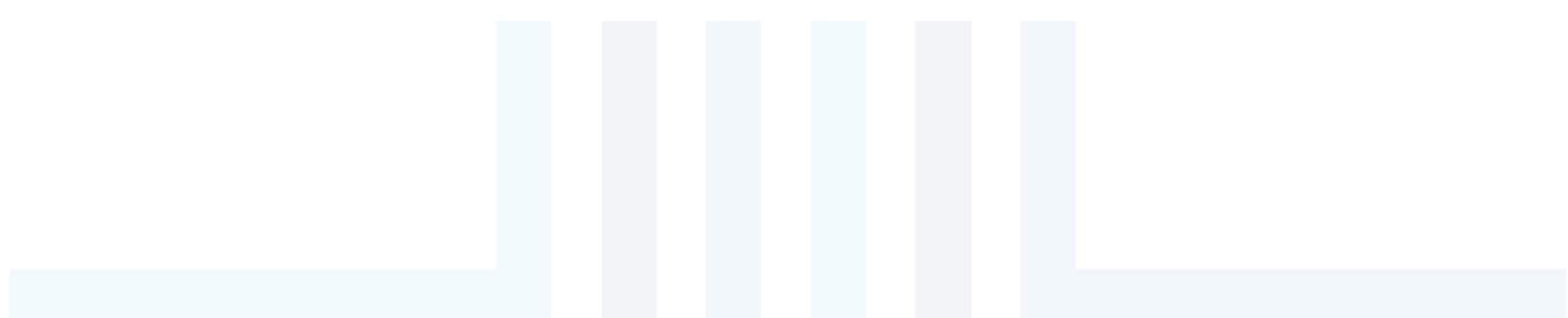
Step 2: Submit a Vendor PASSPort Account Request:

1. Go to the [System Login](#) page.
2. Click the **PASSPort Login** button.
3. Click the **Login** button.
4. Enter your NYC.ID Email Address and password in the log in fields, then click **Log In**.
5. Click **Create Account** to complete the vendor PASSPort account request form including the "Security Control" located below the form. Note: All fields with a red vertical bar are required.
6. Click **Register**.



MOCS will review your vendor PASSPort account request and will notify you of the decision via email. Note: For approved account requests, the requestor becomes the first system user and account administrator. Additionally, the information supplied on the request form will transfer to the vendor account's profile upon approval.

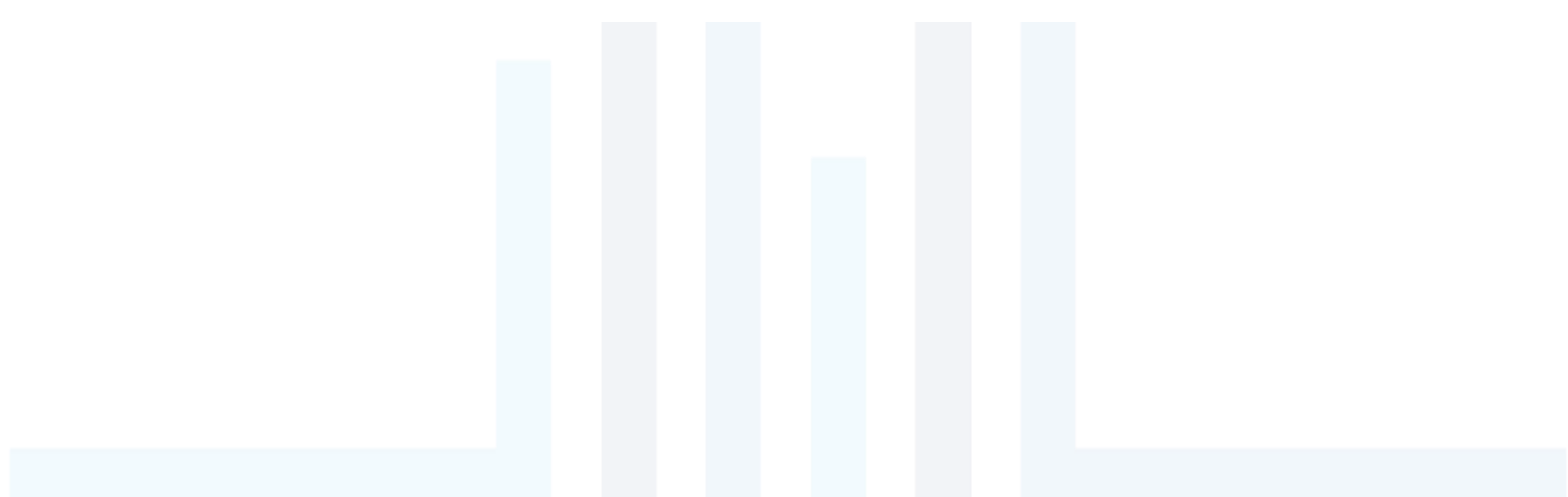
For step-by-step instructions, refer to the [Create a PASSPort Account](#) guide and watch this [tutorial](#).



How do I complete HHS Prequalification?



HHS Prequalification is completed in PASSPort. An HHS Prequalification (HHS PQL) Application can only be completed, signed, and submitted by a user with the Vendor Admin role or Vendor Procurement Level 2 role. For detailed instructions on how to submit an HHS PQL Application in PASSPort, please refer to the [User Manual: HHS Accelerator Prequalification](#) or watch [Completing the HHS PQL Application](#).



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3. Find the HHS Prequalified List

Once logged into your PASSPort account, follow the instructions below to begin the HHS Prequalification Application process in PASSPort:

1. Navigate to the RFX menu from the top of the PASSPort Homepage and select **Browse Prequalified Lists** from the drop-down menu.

The screenshot shows the PASSPort application interface. At the top, there is a navigation bar with the following menu items: Profile, Tasks, Catalog, RFX, Contracts, Ordering, Catalogs, Financials, Reporting, Performance, and Support. The RFX menu is expanded, showing options: Browse My RFX Responses, Browse Public RFXs, Browse Prequalified Lists (highlighted with a red circle and the number 1), and Browse Real-Time Bidding Events. Below the navigation bar, there is a search bar and a 'Homepage' link. The main content area is divided into several sections: 'ANNOUNCEMENT' with a welcome message and links to user resources; 'EXTERNAL QUICK LINKS' with links to City Record Online, Payee Information Portal, M/WBE Online Directory, HHS Accelerator, and PASSPort Website; 'OPEN WORKFLOW TASKS' with a table of tasks; and a 'VENDOR CHECK LIST' table.

Process	Title	Action	Assigned Date	Action's Date (Your Local Time)	Status
Competition Pool - RFI	22 - 0-211 (WorkNew)	Review Queue	05/09/2019		<input type="radio"/>
Competition Pool - RFI	158 - Copy of RFE Comp Pool RFX 1 Bronx (WorkNew)	Review Queue	03/09/2019		<input type="radio"/>
Competition Pool - RFI	425 - 26020v0007_26020v0007-UAT - Req - SS 01_1_UAT SS RFI 1 (WorkNew)	Review Queue	02/18/2020		<input type="radio"/>
Competition Pool - RFI	483 - 26020v0010_26020v0010-UAT - EXAL - SS 0916 SS 0916 01_1_UAT Pool Test User 1 (WorkNew)	Review Queue	02/25/2020		<input type="radio"/>

Item	Yes/No
ACCOUNT CREATED	Yes
Administrator Identified	Yes
Signatory Identified	Yes
Commodity enrollment	No
Vendor Record Status	Draft (CR)
Principal Identified	Yes
Principal Questionnaire(s) Completed	Yes



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- All Prequalified Lists will display. Search for the “HHS Accelerator Prequalification” by entering it in the **Keywords:** text box to filter the results on the page and find the HHS Accelerator Prequalification list.

The screenshot shows the PASSPort interface for RFX Contracts. The search filters are as follows:

- Keywords: HHS Accelerator Prequalification
- Industry: [Dropdown]
- Commodity: [Dropdown]
- Managing Agency: [Dropdown]
- Open Date: [Calendar]
- Availability Status: [Dropdown]
- Approval Required:
- Citywide Only:
- Prerequisite PQL:
- Current Status: [Dropdown]
- Application Activity: [Dropdown]
- Source: [Dropdown]
- Alerts: [Dropdown]

The table below displays the search results:

PQL ID	PQL Label	Prerequisite PQL	Managing Agency	Citywide	Industry	Commodity	Open Date	Availability	Approved Vendors	Source	Current Status	Application Activity	Qualification Expiration Date
PQL000066	HHS Accelerator Prequalification	<input type="checkbox"/>	OFFICE OF CONTRACT SERVICES	<input checked="" type="checkbox"/>	Human/Client Service		08/11/2021	Open	0	PASSPort	Approval Required	None	

The information displayed in the table includes the PQL Label, ID, Managing Agency, Industry, Open Date, Availability, number of Approved Vendors on the PQL and more. Your Organization’s Current Status on the PQL, Application Activity and Qualification Expiration Date will display as well. If you have not submitted an application, the Current Status will display as *Approval Required* and the Application Activity will display as *None*.

- To access the HHS Prequalification list and begin the application process, click the PQL Label or PQL ID.

4. Creating and Submitting the HHS Prequalification Application

To create and submit a PQL Application, users must be provisioned with at least the Procurement Level 2 or Vendor Admin user roles. Procurement Level 1 users can also complete an application, but cannot sign and submit the application for review. For step-by-step guidance on user role assignment, please see our [Guide to Adding Vendor Users and Assigning Roles](#).

1. To begin the application process, click the **Create New Application** button located at the top of the screen.

PQL000066:HHS Accelerator Prequalification

1 Create New Application

Overview
Questionnaire
Documents

PQL INFORMATION

PQL ID : PQL000066
PQL Label : HHS Accelerator Prequalification
Managing Agency : OFFICE OF CONTRACT SERVICES
Citywide :
Source : PASSPort
Approved Vendors :
Industry : Human/Client Service
Commodities :
Availability : Open
Open Date : 08/11/2021
Close Date :

VENDOR STATUS

Application ID :
Application Activity : None
Current Status : Approval Required
Qualification Expiration Date

DESCRIPTION

HHS Prequalification is now live in PASSPort!



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Save

Save and Close

Submit for Review

Cancel Application

Close

Overview

Questionnaire

Documents

Application History

ALERTS

 You must complete all required fields before submitting

2

PQL INFORMATION

PQL ID : PQL000066

Availability : Open

PQL Label : HHS Accelerator Prequalification

Industry : Human/Client Service

Commodities :

Managing Agency : OFFICE OF CONTRACT SERVICES

Citywide :

Open Date : 08/11/2021

Source : PASSPort

Close Date :

Approved Vendors : 0

VENDOR STATUS

Application ID : PQA000106

Current Status : Approval Required

Application Activity : Draft

Qualification Expiration Date@ :

DESCRIPTION



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Save

Save and Close

Overview

Questionnaire **3**

Documents

Application History

ALERTS

 - You must complete all required fields before submitting

PQL INFORMATION

PQL ID : PQL000066

Availability : Open

PQL Label : HHS Accelerator Prequalification

Industry : Human/Client Service

Commodities :

Managing Agency : OFFICE OF CONTRACT SERVICES

Citywide :

Open Date : 08/11/2021

Source : PASSPort

Close Date :

Approved Vendors : 0

VENDOR STATUS

Application ID : PQA000106

Current Status : Approval Required

Application Activity : Draft

Qualification Expiration Date ⓘ :

DESCRIPTION



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4. The Questionnaire consists of one section, the **Business Information** section. To begin filling out the application, select your organization's **Corporate Structure** (*For Profit* or *Nonprofit*) from the drop-down.

The screenshot displays the PASSPort application interface. At the top, there is a navigation bar with the PASSPort logo and various menu items: Profile, Tasks, Catalog, RFx, Contracts, Ordering, Catalogs, Financials, Reporting, Performance, and Support. A user profile icon for 'Balaji V.' is visible in the top right. Below the navigation bar, the breadcrumb trail shows 'POA000106.HHS Accelerator Prequalification'. A search bar is located on the right side of the breadcrumb trail. Below the breadcrumb trail, there are several action buttons: 'Save', 'Save and Close', 'Submit for Review', 'Cancel Application', and 'Close'. On the left side, there is a sidebar menu with options: 'Overview', 'Questionnaire', 'Documents', and 'Application History'. The main content area shows the 'Business Information' section, which is currently 0% complete. A green circle with the number '4' is displayed next to the section title. Below the section title, there is a dropdown menu for 'Corporate Structure' with the prompt 'Please select your organization's corporate structure:'. The dropdown menu is open, showing two options: 'Nonprofit' and 'For Profit'. To the right of the dropdown menu, there is a 'CREATION BY IMPORT' section with a prompt 'Drop here your answer (in Excel format)' and an 'Upload (in Excel format)' button. Below the upload button, there are two download links: 'Download in Excel 2007-2010 format (.xlsx)' and 'Download in Excel 97-2003 format (.xls)'. The overall interface is clean and professional, with a blue and white color scheme.

Based on the **Corporate Structure** selection, a list of questions, specific to your organization's corporate structure will appear on the screen that you are required to fill out.

If you select *Nonprofit* you will be asked a series of questions and upload documentation related to your structure: Certification of incorporation or equivalent, Corporate by-laws, Board of directors, Tax filing/ IRS determination letter, Conflict of interest policy, and or Board conflict of interest policy, Whistleblower policy, Financial Controls part 1, Financial Controls part 2, and Charities filings.

If you select *For Profit*, you will be asked to upload your Articles of Organization or equivalent, Board of Directors list or equivalent, Corporate by-laws or equivalent, Financial Controls part 1, Financial Controls part 2, and Financial Statements.



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5. Navigate to the **Documents** Tab to upload any required documentation in connection with your application. The **Documents** Tab displays the list of required documents needed to successfully submit your PQL Application.

The screenshot shows the PASSPort application interface. The top navigation bar includes the PASSPort logo and menu items: Profile, Tasks, Catalog, RFX, Contracts, Ordering, Catalogs, Financials, Reporting, Performance, and Support. The user is logged in as Balaji V. The breadcrumb trail shows the current page is PQA000106:HHS Accelerator Prequalification. The main content area has a toolbar with buttons: Save, Save and Close, Submit for Review, Cancel Application, and Close. The left sidebar has a navigation menu with 'Overview', 'Questionnaire', 'Documents', and 'Application History'. The 'Documents' tab is selected. The main content area displays a table titled 'REQUIRED DOCUMENTS' with the following data:

Document Type	Document Label	Document Name	Last Modified By	Last Modified Date and Time (Your Local Time)	Status	Download	Validity
Financial Statement or Report	Filing Documents (i.e. Charities or Financial Statement)				Pending upload		

1 Result(s)

6. Only one Document Type is listed: **Financial Statement or Report**. Instructions on what documentation specifically applies to your organization and is required to be uploaded here are included in the Questionnaire. To add a document, click on the **pencil icon**.

Nonprofits: Required documentation depends on the nonprofit organization's revenue, among other factors. Please see the table below, or refer to the Charities Bureau's [Annual Filings](#) and [Registry Search](#) tool to help determine your nonprofit organization's structure. For specific questions related to your organization, please directly reach out to the [Charities Bureau](#).

Determining HHS Prequalification Application Filing Documents

The Table below provides guidance on the required Filing Documents for nonprofit organizations. Identify the Type of Nonprofit Organization that applies to your organization to see which Filing Documents are required for submission with your organization's HHS Prequalification (PQL) Application. If your organization is required to submit multiple documents, combine into a single document and upload to your HHS PQL Application through the Documents Tab.

Type of Nonprofit Organization	Filings Documents Required by Charities & HHS Prequalification Application					Exempt from Annual Filings Documents:
	Char410	Char500	IRS 990 form	CPA Reviewed Report	CPA Reviewed Audit	Exemption Letter & 12-month Financial Statement
Nonprofit Corp. new to Filing w/ Charities** (within the last year)	✓					
Nonprofit Corp. Revenue \$25K & under*		✓				
Nonprofit Corp. Revenue over \$25K to \$250K**		✓	✓			
Nonprofit Corp. Revenue over \$250 to \$1M**		✓	✓	✓		
Nonprofit Corp. Revenue over \$1M**		✓	✓		✓	
Nonprofit Corp. Exempt from Filing w/ Charities (determined by the Charities Bureau)*						✓

*Required documents are typically based on your organization's revenue. Please research and review the Nonprofit Revitalization Act/New York State Regulations.

† For specific questions related to your Charities Filings that are unique to your organization: Please reach out, directly, to the [Charities Bureau](#).

**New to Registering with the Charities Bureau? Register via their [online portal](#) today and upload the completed Char410 form to your Prequalification application.



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Fiscal Year 2026 Discretionary Funding Expense Application Filing Period

Please be advised that all not-for-profit community-based organizations that wish to apply for discretionary funding for FY2026 must submit a Council Application. The FY2026 application will be posted on the Council's website at this location on **Monday, January 6th, 2025** and the submission deadline will be on **Wednesday, February 19th, 2025**.

[Apply for FY2026 Discretionary Funding](#)

[Access Submitted and In-Progress Applications](#)

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Instructions

DUE Wednesday, February 19th, 2025

<https://council.nyc.gov/budget/>



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1 Instructions

2 Organization and Contact Info

3 Request Details

4 Participation

5 Acknowledgement and Attachments

6 Review My Application

Instructions

[Printer Friendly Version](#) | [E-mail Draft](#)

* Required before final submission

Instructions:

This application must be completed by an officer or employee of the organization applying for discretionary funding. All requests for funding must be submitted and will only be accepted through the Blackbaud portal. All sections of the application are mandatory unless otherwise noted. Applications should be accurate and complete. Please keep a copy of the completed application for the organization's records

Person(s) completing the application must be authorized by the entity, and have a comprehensive understanding of the organization in order to fully, truthfully and accurately complete the form(s).

All requests for discretionary funding submitted to New York City Council are considered public documents.



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APPLICATION CHECKLIST

1. Federal Employer Identification Number (FEIN or EIN)
2. NYS Charities Bureau Registration Number
3. Annual Organization Operating Budget
4. Information/Documentation concerning inquiries, monitorships, government investigations, corrective action plans or audits (other than routine annual audit).
5. Organization's staffing information.
6. Program staffing information.
7. Certificate of incorporation (if incorporated on or after July 1, 2023)
8. List of Board Members and High/Executive Level Employees
9. Apply for Pre-Qualification in PASSPort



Engage City Council Members

Contact the Council Members' offices to which you are going to apply and request any additional supplemental forms they require.

Council Members want to see your Organization has internal capacity! Keep program and service delivery subcontracting to a minimum.

Engage with your Council Member!

Invite them to your site.

Share your good work and programs with them.

Mail them your brochures.

Add them to your mailing lists and social media.



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ORGANIZATIONAL CAPACITY & TIMELINE

February 19, 2025
Applications
Due

July 1, 2025
NYC Fiscal Year
Begins

July / August
Notice of Funding
Awards

August—October
Respond to Award
Tasks in PASSPort

Attend MOCS
training as
necessary

Register
Contract

Start
Your
Work

Complete
Expenditure
Forms

Get
Paid



ORGANIZATIONAL CAPACITY & TIMELINE

Remember this is a
reimbursement grant!

(unless you contract with DCLA)

Does your organization have the staffing and
financial resources to manage?



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Q&A

THANKS FOR JOINING US!

- Tamara Keshecki
- Owner, AINOK Consulting LLC
- <https://www.ainokconsulting.com/>
- <https://www.linkedin.com/in/tamara-keshecki/>

NEED MORE HELP?

VISIT WWW.NPHD.ORG AND
CLICK 'REQUEST HELPDESK SUPPORT'
TO COMPLETE FORM