REQUEST FOR INFORMATION
for a
Benefits Access Centers
for The
CITY OF PHILADELPHIA

Issued by:
THE CITY OF PHILADELPHIA ("City")
Mayor's Office of Community Empowerment and Opportunity (CEO)

Responses must be received no later than 5:00 p.m. Philadelphia, PA, local time, on Wednesday, January 15th, 2014.

Michael A. Nutter, Mayor
Eva Gladstein, Executive Director,
Mayor's Office of Community Empowerment and Opportunity

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BENEFITS ACCESS CENTERS
REQUEST FOR INFORMATION (RFI)

I. RESPONSE CALENDAR

Posting of RFI	Friday, December 20th, 2013
Deadline for questions, requests for clarification, or requests for additional information	Friday, January 3rd, 2014
Response Due Date	Wednesday, January 15th, 2014

II. RFI CONTACT INFORMATION

All questions concerning this RFI must be submitted via email no later than 5 pm on Friday, January 3rd prior to the response due date and directed to:

Mary Horstmann
Mayor's Office of Community Empowerment and Opportunity
mary.horstmann@phila.gov

Oral responses by any City employee or agent of the City are not binding and shall not in any way be considered as a commitment by the City.

III. PURPOSE OF REQUEST FOR INFORMATION

The primary purpose of this pre-funding request is to give organizations an opportunity to inform the Mayor's Office of Community Empowerment and Opportunity (CEO) of their compentenices, capacity, existing low-income base and other additional information that may be relevant to how their community-based multi-service agencies could serve in connecting low-income individuals to public benefits as a Benefits Access Center. Benefits Access Centers, along with Benefits Referral Sites, will be part of a system of sites to help people be screened and enrolled in benefits. Here is some additional information on the two types of sites:

- Benefits Access Centers – CEO plans to partner with four community-based multi-service agencies to screen low-income Philadelphia residents for federal, state, and local benefits/entitlements and services for which they are eligible, and assist those individuals with successfully applying for those benefits and services. Benefits Access Centers will likely be provided with a screening tool, financial and programmatic support to hire staff, and training from a benefits enrollment organization.
- Benefits Referral Sites -- CEO will also select an undetermined number of agencies that will help identify low-income Philadelphia residents' eligibility for benefits, and connect them to larger system of support to help them enroll. Benefits Referral Sites will likely be provided with a screening tool and training from a benefits enrollment organization.

This effort is part of the implementation of Shared Prosperity Philadelphia, our plan to fight poverty.

Information provided by respondents will help to define a scope of work for a future contract opportunity. This RFI will also help CEO to identify qualifying 501(c)(3) organization or organizations with whom to contract when the scope is completed and the decision to solicit for proposals for a contract is made.

CEO encourages all non-profit entities that may be interested in partnering with CEO on benefits enrollment to prepare a response to this RFI in order for the City to plan and identify sufficient resources for such a project. Responses to this RFI are considered non-binding, and are used to assist the City in performing information gathering for planning purposes. Responses to this RFI will help shape a future scope of work, but are not a requirement to be considered for contracting.

IV. ABOUT THE MAYOR'S OFFICE OF COMMUNITY EMPOWERMENT AND OPPORTUNITY

On January 15, 2013, the City of Philadelphia launched the Mayor's Office of Community Empowerment and Opportunity (CEO). The mission of CEO is to increase opportunities for low income individuals, families, and communities. CEO serves as a single point of contact and accountability for the City's anti-poverty efforts, while supporting City departments and lead agencies in meeting their yearly anti-poverty goals. CEO also evaluates the effectiveness of anti-poverty pilots and programs and convenes stakeholders to identify opportunities for collaboration. CEO manages the Community Service Block Grant funds (approximately $4.8 million in calendar year 2013) and other resources.

In July 2013, CEO released Shared Prosperity Philadelphia, the City's anti-poverty plan with the goal of reducing the effects of poverty in Philadelphia. Today, more than 1 in 4 Philadelphians lives below the federal poverty line. Thousands more struggle each month to pay for basic necessities, or to find ways to stay above water when they lose their jobs or face a health emergency. Combined, the City of Philadelphia and other local government agencies spend over $684 million each year on programs to assist low income residents. In these tough economic times and as public dollars grow scarce, we must maximize the impact of those dollars. The plan lays out a road map for focusing our priorities, and a structure for better collaboration between the City government, businesses, non-profits, and residents to address poverty in Philadelphia.

The plan focuses on five goals:

- Focus job creation and workforce development efforts for adults with the greatest barriers to employment;
- Expand access to public benefits and essential services;
- Ensure children enter school prepared and expand year-round learning opportunities;
- Increase housing security and affordability; and
- Strengthen economic security and asset building.

Learn more about the Mayor's Office of Community Empowerment and Opportunity and Shared Prosperity Philadelphia by visiting http://www.SharedProsperityPhila.org.

V. ABOUT THE BENEFITS ENROLLMENT INITIATIVE

One of the key goals of Shared Prosperity Philadelphia is to enable residents to increase their household income by expanding access to public benefits and essential services. Too many Philadelphians do not take advantage of key public benefits. One out of every five eligible residents do not receive nutritional assistance under the Supplemental Nutrition Assistance Program (SNAP) or the extra cash available to the working poor under the Earned Income Tax Credit (EITC). In addition, many of the 35,000 local residents who lost their monthly General Assistance stipend when the program was eliminated last summer may be eligible for Social Security Disability Insurance (SSDI) or Temporary Assistance for Needy Families, but have yet to enroll.

The objectives of this effort are to:

- Increase the percentage of eligible Philadelphians that utilizes critical federal, state, and local benefits as well as key support services;
- Conduct comprehensive screening of clients to determine their needs, and what benefits they are eligible for;
- Provide opportunities for cross-referrals, by locating benefits enrollment services within or with close ties to existing multi-service organizations to leverage the organization's infrastructure and resources, and build from the organization's established relationship with the community;
- While preserving client confidentiality and adhering to all privacy regulations, collect comprehensive data to use in a rigorous evaluation of the program. Findings will be used to inform future programming.

One of the primary ways that CEO intends to achieve this goal is through the establishment of Benefit Access Centers in existing community sites in high need neighborhoods throughout Philadelphia. The Benefit Access Centers would be housed within community-based multi-service agencies or other pre-existing high traffic agencies easily accessible to underserved low-income neighborhoods. They would leverage the array of services already available within those organizations as well as the base of customers that they serve to provide additional supports to low-income residents. CEO wants to ensure that the Benefit Access Centers have the capacity to screen individuals for eligibility for benefits and services, and offer consistent and successful access to those resources.

CEO intends to create four Benefits Access Centers (in the first year, and more after that dependent upon funding) that would be physical sites located in community-based multi-service agencies. These sites would use community agency staff to screen low-income residents for public benefits and assist residents in the application process for multiple public benefits at the same time or through repeat visits. Clients would get support in applying for the benefit, including collecting and organizing the appropriate paperwork, and tracking their application through the receiving government agency to help resolve issues as they arise. CEO will provide

Benefits Access Centers with a screening tool, financial and programmatic support, and training from a benefits enrollment organization.

This work will be supplemented by: 1) Benefits Referral sites that will provide benefits screening and referrals to a Benefits Access site to support the application process 2) a small mobile unit of staff from the Mayor's Office of Community Empowerment and Opportunity (CEO) that will help screen and enroll individuals for benefits by visiting programs and organizations on an as-needed basis. Potential Benefit Referral sites could include Financial Empowerment Centers, housing counseling organizations, Neighborhood Energy Centers, Neighborhood Advisory Committees, legal services agencies, and other community-based sites. These sites will use a benefits screening tool supplied by CEO.

CEO, community-based multi-service agencies (both Benefits Access Centers and Benefits Referral sites), and the benefit enrollment organization, will all have critical roles to play in the implementation of this effort, and to support low-income clients in successfully accessing benefits. Here is the breakdown of those roles:

Role of the City/CEO

- Develop and implement a public awareness campaign to drive traffic to the Benefits Access Centers;
- Provide technical assistance to the community agencies in troubleshooting difficult client cases or cases where the client was declined, and help the CBO staff to navigate the bureaucracy of the agency receiving the application;
- Staff a mobile benefits access unit that would visit community-based multi-service agencies and key low-income programs for brief periods to help screen and enroll clients in public benefits;
- Provide support and technical assistance to community agency staff in inputting data and tracking outcomes in the data tracking/case management system.

Role of Communtiy-Based Multi-Service Agencies as Benefits Access Centers

- Support outreach and recruitment of clients to the Benefits Access Centers, including making referrals from other services within the agency;
- Schedule appointments for clients to be screened and enrolled in public benefits;
- Use a uniform electronic system to screen clients for public benefit eligibility, and work with them to complete their application for public benefits, including compiling and submitting the appropriate documents such as driver's license and pay stubs;
- Provide support to confirm that the client has completed their application(s) and track progress in the appropriate government system;
- Elevate cases of clients that are not being served appropriately by the state or federal benefits agency to CEO staff and Benefits Enrollment Organization;
- Track outcomes of application and monitor for completeness;
- Follow up with clients to ensure they recertify for their benefits when needed, including notifying clients of need for recertification, and guiding them through steps of recertification;
- Identify potential sites for mobile benefits access services

- Ensure holistic service provision that includes meaningful integration with existing programs for low-income clients, so the individual is getting the benefit of layered services.

Role of Community-Based Multi-Serivce Agencies as Benefits Referral Site

- Screen clients using a uniform screening tool for public benefits eligibility and connect them to resources to enroll in public benefits, including scheduling an appointment at a Benefits Access Center;
- Participate in network of agencies focused on improving access to public benefits for low-income residents;
- Report on screenings and referrals
- Identify potential sites for mobile benefits access services
- Support outreach and recruitment of clients to the Benefits Access Centers, including making referrals from other services within the agency.

Role of the Benefits Enrollment Organization

- Provide the uniform tool used to screen for benefits and submitting applications for Benefits Access Centers and the screening and referral sites;
- Train community agency staff in screening for benefits and successfully enrolling clients;
- Train CEO staff on tool and assist with troubleshooting benefits applications;
- Provide technical assistance in using the screening and application tool;
- Provide "help desk" support for the tools and technical updates to the tool as needed.
- Support the development of systems at community agencies to ensure clients are supported in the recertfication process, track the success of that system, and implement changes as needed
- Coordinate community agency staff efforts to ensure high performance of initiative, and strong rates of successful applications to benefits;
- Work with government agencies to simplify application processes and resolve systemwide barriers to benefits access as trends arise;
- Facilitate use of mobile benefits access sites that operate out of city vehicles or visit a community agency for a brief period;
- Ensure coordination between CEO technical assistance staff, community agency, and benefits enrollment staff to create seamless assistance for the customer;
- Report on activities and outcomes to CEO;
- Identify and license a scheduling tool for community agencies to use to schedule appointments with clients, and coordinate scheduling appointments through a single telephone number for all Benefits Access Centers;
- Support outreach and identifying potential clients.

As stated above, the work should be integrated so that the hand off from one implementation partner to the next would be seamless for the client.

Key Benefits

CEO intends for the Benefits Access initiative to provide support for applications for the following benefits (at a minimum): Supplemental Nutrition Assistance Program (SNAP/Food

Stamps), Earned Income Tax Credit (EITC), Temporary Assistance for Needy Families (TANF), WIC, Unemployment insurance, Child tax credit, Health insurance (CHIP, Medicaid, Medicare), veterans benefits, state and city property tax relief benefits and LIHEAP.

Selection of Benefits Access Centers

In the future selection of community-based multi-service agencies that could serve as benefits access centers or referral sites, CEO will consider the following elements, among others:

- Areas of high need – CEO will focus Benefits Access Centers in areas that have high rates of poverty and low levels of enrollment as compared to need;
- Proven Track Record – Selected organizations will have a proven track record of empowering low-income clients and giving them the tools to stabilize their lives as well as a pre-existing stream of low-income clients that currently come to their offices;
- Providing Other Core Services – Selected organizations will provide other core services that help support low-income individuals that can be layered on top of the benefits enrollment supports, such as housing counseling, affordable child care, financial literacy services, health services, etc.;
- Geographic diversity – Locations should be geographically diverse and accessible by public transportation, so that at least one location is accessible to all low-income individuals;
- Place-based strategy alignment – Some locations will align with place-based strategies that are being developed in partnership with City government. These areas include Mantua/West Philadelphia, Eastern North Philadelphia, and the 22nd Police District in North Philadelphia.

Timeline

The proposed timeline for the project is as follows:

- Hire and train staff at Enrollment organization and Access Centers -- Completed by Friday, February 28th, 2014
- Benefits Access Centers open – Monday, March 10th, 2014
- Benefits Referral sites open – Monday, March 17th, 2014

VII. SUBMISSION REQUIREMENTS

If you are interested in becoming a Benefits Access Center site, please answer the following questions (3 Pages Maximum):

1. How do you plan to integrate benefit screening and application support into your services?
2. Please describe how becoming a Benefits Access Center site will provide value to your organization and your clients. Please describe your organization's clientele.
3. Provide a simple flow chart with description to show when and how benefit screening would occur vis-a-vis other services provided by the agency.
4. What challenges do you anticipate experiencing in integrating benefits screening and enrollment?
5. How will your organization engage in community outreach/promotion of services?
6. How many of your current clients do you anticipate will be referred for benefits screening and enrollment? Would your organization be amenable to serving the general public

outside of your current client (i.e. through appointments scheduled through a hotline number)?

7. Please indicate your ability to start this work in February 2014.

8. Describe past successes you have had in connecting individuals to public benefits. Provide details on your ability to document and report on outcomes, your history of success in having clients successfully enroll for multiple benefits, your experience integrating with outside organizations to implement a program.
9. What facilities are available to accommodate a benefits access counselor? Considerations include a semi-private office space, a phone line, internet connection, computer, and use of office equipment (printer, photocopier, scanner, shredder, etc.). What days a week/which hours would this space and the office be available for the counselor to see clients?

VIII. HOW TO SUBMIT

Applicants must submit their responses electronically as a single document to:

Mary Horstmann
Mayor's Office of Community Empowerment and Opportunity
Mary.horstmann@phila.gov

Responses are due by 5 pm, Wednesday, January 15th, 2014.

IX. CONFIDENTIALITY AND PUBLIC DISCLOSURE

Applicants shall treat all information obtained from the City which is not generally available to the public as confidential and/or proprietary to the City. Applicants shall exercise all reasonable precautions to prevent any information derived from such sources from being disclosed to any other person. Applicants agree to indemnify and hold harmless the City, its officials and employees, from and against all liability, demands, claims, suits, losses, damages, causes of action, fines and judgements (including attorney's fees) resulting from any use or disclosure of such confidential and/or proprietary information by any Applicant or any person acquiring such information, directly or indirectly, from the successful Applicant.