

## *REQUEST FOR IDEAS (RFI)*

### ***Social Security Benefits Conservator Accounts***

This document is a Request for Ideas (RFI) about how the City of Philadelphia (City) maintains funds received on behalf of foster youth for Retirement, Survivor's, and Disability Insurance (RSDI) benefits obtained during placement. The City will use the information from this RFI as the basis for further discussion and potentially a Request for Proposals (RFP). Entities responding to this RFI should read this document carefully and follow the guidance for submitting ideas.

**Cherelle Parker, Mayor**  
***Kimberly Ali, Commissioner, Department of Human Services***  
**The City of Philadelphia**

## **Response Calendar**

Informational Session (Virtual)

April 11, 2024

10:30 am – 11:30 pm

(Local Philadelphia Time)

[Join here](#)

Deadline for questions, requests for clarification, or requests for additional information

April 15, 2024, before 5:00 pm

(Local Philadelphia Time)

City Responds to Questions

April 19, 2024

Responses to RFI Due

April 26, 2024, before 5:00 pm

(Local Philadelphia Time)

## **I. PURPOSE OF REQUEST FOR IDEAS**

### **A. Introduction (Administrative Overview)**

The City of Philadelphia Department of Human Services (DHS) has many complex financial systems and revenue collection processes to provide placement maintenance for children and youth known to the system. The various revenue streams that create our annual budget include, but are not limited to, Title IV-E, Title IV-B, TANF, Act 148, and PA Special Grants.

Children in the custody of DHS are eligible for certain entitlements and benefits granted by the Social Security Administration.

DHS seeks input from a vendor(s) with knowledge of these revenue collection processes as well as requirements related to the Social Security Representative Payee Program, conservator accounts, public benefits and income tax law, and financial literacy and assistance for young people exiting care to support DHS with developing a structure to provide protection of non-maintenance benefits in the most conducive way

to educate and inform our practice and clients. DHS is seeking guidance that is family and child centered.

## **B. Background**

Federal regulations allow for children/youth in foster care to receive concurrent placement maintenance and benefits from the county children and youth agency (CCYA) and the Social Security Administration (SSA). These Social Security benefits may include RSDI and Supplemental Security Income (SSI).

### **Retirement, Survivor's, and Disability Insurance (RSDI)**

The SSA-managed Retirement, Survivors, and Disability Insurance (RSDI) program refers to a social insurance program that protects workers and their families from a loss of earnings because of retirement, death, or disability. Social Security benefits are based on the earnings of a worker who has paid into the system by paying Federal Insurance Contributions Act (FICA) tax for a specified period of time. A worker, or their family or dependents, can receive RSDI benefits upon the worker's attainment of a certain retirement age, disability, or death. A child/youth in foster care may be eligible for RSDI payment benefits through their eligible family member.

### **Supplemental Security Income (SSI)**

The SSA provides monthly SSI benefits to people with limited income and resources who are blind, age 65 or older, or have a qualifying disability. Children/youth who have disabilities or who are blind may also receive SSI benefits. Unlike RSDI, SSI benefits are not based on an individual's or family member's prior work.

### **Social Security Representative Payee Program**

In general, children/ youth under the age of 18 must have a payee. When selecting a payee, the SSA prefers the beneficiary's parent, legal guardian, spouse, or other close relative or friend who has a strong interest in the beneficiary's welfare. When such individuals are unavailable, unsuitable, or unwilling to serve, the SSA may select an organization, such as a CCYA.

## **II. REQUEST FOR IDEAS (RFI)**

The City seeks information and ideas to understand the best method for the following items:

- A family and child-centered approach to Social Security benefit management;

- Methodology to conserve Social Security funds for children and youth in DHS care;
- Types of Conservator Accounts that minimize the impact of eligibility for future benefits (i.e. public benefits);
- Process for establishing, maintaining, and transferring accounts;
- Ways to assist families in all cases with becoming the representative payees upon reunification or adoption;
- Ways to assist youth transitioning out of care with ways to access and/or establish bank accounts, provide financial literacy and other related assistance;
- Understanding tax implications for children and youth who receive benefits;
- Process for determining amount/percentage of federal benefits to be conserved; and
- Guidelines for releasing funds which shall include financial literacy education.

### **III. USE OF RESPONSES**

The City does not intend to announce any further actions taken pursuant to this RFI. If any such announcements are made, at the sole discretion of the City, those announcements will be posted with the original RFI. At the City's sole discretion, the City may issue an RFP. The City will notify Respondents to this RFI if an RFP has been posted on the City's website. The City will notify Respondents if additional information is required in order to evaluate responses to this RFI. Absent such follow-up from the City, we respectfully request that Respondents refrain from requesting additional information on the status of this RFI. In order to protect the integrity of the City procurement process, City personnel will not respond to requests for additional information on the status or outcome of this RFI, other than as described above.

### **IV. HOW TO SUBMIT RESPONSES**

Respondents should submit their responses electronically (hard copies are unacceptable) in MS Word or Adobe PDF format to [DHSRFP@phila.gov](mailto:DHSRFP@phila.gov).

**Responses are due April 26, 2024, before 5:00 pm, Local Philadelphia Time.**

Note: Response document(s) are limited to 15 MB and preferably submitted as a single document; if necessary, please submit multiple files or zip/compress the file(s).

### **V. CONFIDENTIALITY AND PUBLIC DISCLOSURE**

Respondents shall treat all information obtained from the City which is not generally available to the public as confidential and/or proprietary to the City. Respondents shall exercise all reasonable precautions to prevent any information derived from such sources from being disclosed to any other person. No other party, including any Respondent, is intended to be granted any rights hereunder.

## **VI. RIGHTS AND OPTIONS RESERVED**

In addition to the rights reserved elsewhere in this RFI, the City reserves and may, in its sole discretion, exercise any or more of the following rights and options with respect to this RFI if the City determines that doing so is in the best interest of the City:

1. Decline to consider any response to this RFI ("response"); cancel the RFI at any time; elect to proceed or not to proceed with discussions or presentations regarding its subject matter with any Respondent and with firms that do not respond to the RFI; to reissue the RFI or to issue a new RFI (with the same, similar or different terms);
2. Waive, for any response, any defect, deficiency or failure to comply with the RFI if, in the City's sole judgment, such defect is not material to the response;
3. Extend the Submission Date/Time and/or to supplement, amend, substitute or otherwise modify the RFI at any time prior to the Submission Date/Time, by posting notice thereof on the City web page(s) where the RFI is posted;
4. Require, permit or reject amendments (including, without limitation, submitting information omitted), modifications, clarifying information, and/or corrections to responses by some or all Respondents at any time before or after the Submission Date/Time;
5. Require, request or permit, in discussion with any Respondent, any information relating to the subject matter of this RFI that the City deems appropriate, whether it was described in the response to this RFI;
6. Discontinue, at any time determined by the City, discussions with any Respondent or all Respondents regarding the subject matter of this RFI, and/or initiate discussions with any other Respondent or with vendors that did not respond to the RFI;
7. To conduct such investigations with respect to the financial, technical, and other qualifications of the Respondent as the City, in its sole discretion, deems necessary or appropriate;
8. Do any of the foregoing without notice to Respondents or others, except such notice as the City, in its sole discretion, may elect to post on the City web page(s) where this RFI is posted. This RFI and the process described are proprietary to the City and are for

exclusive benefit of the City. Upon submission, responses to this RFI shall become the property of the City, which shall have unrestricted use thereof.

## **VII. PUBLIC DISCLOSURE**

By submitting a response to this RFI, Respondent acknowledges and agrees i) that the City is a “local agency” under and subject to the Pennsylvania Right-to-Know Law (the “Act”), 65 P.S. §§ 67.101-67.3104, as the Act may be amended from time to time; and ii) responses may be subject to public disclosure under the Act. In the event the City receives a request under the Act for information that a Respondent has marked as confidential, the City will use reasonable efforts to consult with Respondent regarding the response and, to the extent reasonably practicable, will give Respondent the opportunity to identify information that Respondent believes to be confidential proprietary information, a trade secret, or otherwise exempt from access under Section 708 of the Act. Notwithstanding anything to the contrary contained in this RFI, nothing in this RFI shall supersede, modify, or diminish in any respect whatsoever any of the City’s rights, obligations, and defenses under the Act, nor will the City be held liable for any disclosure of records, including information that the City determines in its sole discretion is a public record and/or information required to be disclosed under the Act.

## **VIII. RFI Contact Information for Questions or Requests for Clarification**

All questions (see RFI Question Template Exhibit) and requests for clarification concerning this RFI must be in writing and submitted via email at [DHSRFP@phila.gov](mailto:DHSRFP@phila.gov), no later than 5:00 pm, Local Philadelphia Time, on Date April 15, 2024.

Mika Walton  
*Chief of Staff*  
Department of Human Services  
Mika.Dabney-Walton@phila.gov

Nadine Perese  
*Chief Financial Officer*  
Department of Human Services  
Nadine.E.Perese@phila.gov

Responses to questions and requests for additional information shall be at the sole discretion of the City. Any additional information and/or responses to questions will be posted only on the City’s website at <https://www.phila.gov/departments/office-of-the-chief-administrative-officer/contract-opportunities-with-special-application-processes/>. No additional information and/or responses to questions will be sent by email. Nothing in this RFI shall create an obligation on the City to respond to a Respondent submitting a response. The City may, in its sole discretion, issue addenda to this RFI containing responses to questions, clarifications of the RFI, revisions to the RFI or any other matters that the City deems appropriate. Addenda, if any, will be posted on the City’s website at

<https://www.phila.gov/departments/office-of-the-chief-administrative-officer/contract-opportunities-with-special-application-processes/>. It is the Respondent's responsibility to monitor this site for Addenda and to comply with any new information.

# Appendix A: RFI Response Template

## 1. General Information

1.1 Firm Name:
1.2 Street Address:
1.3 City, State, Zip:
1.4 Primary Business:
1.5 Point of Contact:
1.6 Title:
1.7 Phone:
1.8 Email:
1.9 Willing to make a presentation for City, if requested? Yes OR No
1.10 Parent Company (PC) Name:
1.11 PC Street Address:
1.12 PC City, State, ZIP:

## 2. Proposal

2.1. Please describe your solution and how your organization would address some or all of the points outlined in the RFI. Please include proposed uses, capacity, and/or services proposed to be delivered. Please provide a comprehensive list of assets your solution would use, repurpose, or want to access. Please provide additional information you would need about the assets in order to facilitate use (this can be one, some or all).

2.2 Does your solution require additional in-kind City resources (e.g. staff time, technology, access to other city-owned assets, engineers, inspectors, etc.)?

2.3 Please provide a list of what you view as the City's optimal responsibilities versus what your organization would provide?

2.4 Explain how your proposed solutions might generate revenue? What types of revenue generation models would you propose? If you have had prior experience working with



local governments to monetize their assets, provide examples describing the assets and the amount of annual revenue generated.

2.5 If your solution is for in-kind services for use of the assets, provide information about the low-cost or no-cost value it could provide to the city in exchange for assets

2.6 Explain how your proposed solution benefits the City and its residents?

2.7 Has your solution ever been implemented before? If yes, please list where your solution has been implemented and the results of each deployment.

2.8 Would you need to partner with any other organizations or firms to deliver your solution to Philadelphia? If so, do you need support identifying potential partner organizations?

2.9 Based on your understanding of the scope of this project, what challenges or areas of concern do you have?

2.10 What additional information should be included this RFI?

2.11 What would the financial model of your proposal look like?

2.12 How would you describe your business/organization? (size, minority or women owned business, history)

2.13 Please propose a timeline for the completion of the project.

2.14 Would you be open or recommend piloting the proposed solution within certain areas of the city at first? If so, please elaborate.