



NonProfit
HelpDesk

2024-2025



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Introduction to Discretionary Funding:

February 3, 2025 / 6:30pm | FACILITATOR: TAMARA KESHECKI

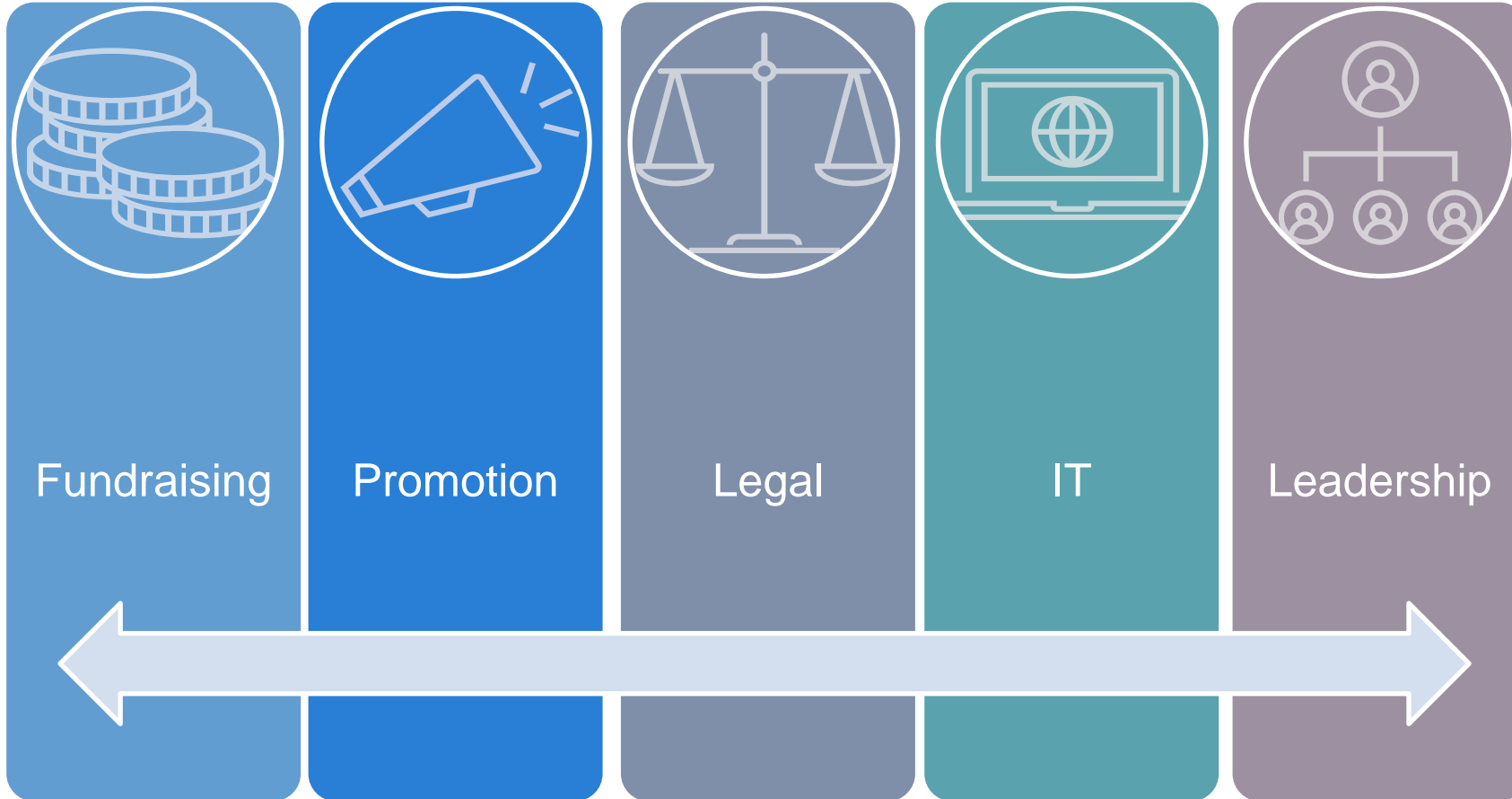
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Introduction to NYC Discretionary Funding

Hosted by:
Council Member Sandy Nurse
District 37 Brooklyn



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TAMARA KESHECKI

Facilitator, Discretionary Funding



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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 Councilmembers including:

Speaker Adrienne Adams
Councilmember Justin Brannan
Councilmember Crystal Hudson
Councilmember Farah Louis
Councilmember Ari Kagan
Councilmember Inna Vernikov
Councilmember Rita Joseph
Councilmember Susan Zhaung



WHAT IS NYC DISCRETIONARY EXPENSE FUNDING?

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, under section 1-02(e) of the Procurement Policy Board (PPB) rules.



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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.

Discretionary Funding Policies and Procedures

New York City Council

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



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.

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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NYC Agency Acronyms

MNBP	Manhattan Borough President
BXBP	Bronx Borough President
BKBP	Brooklyn Borough President
QNBP	Queens Borough President
SIBP	Staten Island Borough President
OEM	Office of Emergency Management
NYPL-R	New York Public Library, Rare Book and Manuscript Division
NYPL	New York Public Library
BPL	Brooklyn Public Library
QBPL	Queens Public Library
DOE	Department of Education
CUNY	The City University of New York
NYPD	New York Police Department
FDNY	New York City Fire Department
ACS	Administration for Children's Services
DSS/HRA	Department of Social Services / The Human Resources Administration
DHS	Department of Homeless Services
MOCJ	Mayor's Office of Criminal Justice
NYCHA	New York City Housing Authority
DFTA	Department for the Aging
DCLA	Department of Cultural Affairs
DYCD	Department of Youth and Community Development
DOP	Department of Probation
SBS	Small Business Services
HPD	Housing Preservation and Development
DOHMH	Dept. of Health and Mental Hygiene
HHC	Health + Hospitals
DSNY	Department of Sanitation
DOT	Department of Transportation
DPR	Department of Parks and Recreation
DCAS	Department of Citywide Services
DANY	Manhattan District Attorney's Office
DABX	Bronx District Attorney's Office
DABK	Brooklyn District Attorney's Office
DAQN	Queens District Attorney's Office
OSNP	Special Narcotics Prosecutor's Office
PANY	Public Advocate New York (Manhattan)
PABX	Public Advocate Bronx
PABK	Public Advocate Brooklyn
PAQN	Public Advocate Queens
PASI	Public Advocate Staten Island
DASI	Staten Island District Attorney's Office
DOITT	Office of Technology and Innovation
DCWP	Department of Consumer and Worker Protection



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

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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.



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Step 1: Register and validate a NYC.ID (skip this step if you have a NYC.ID):

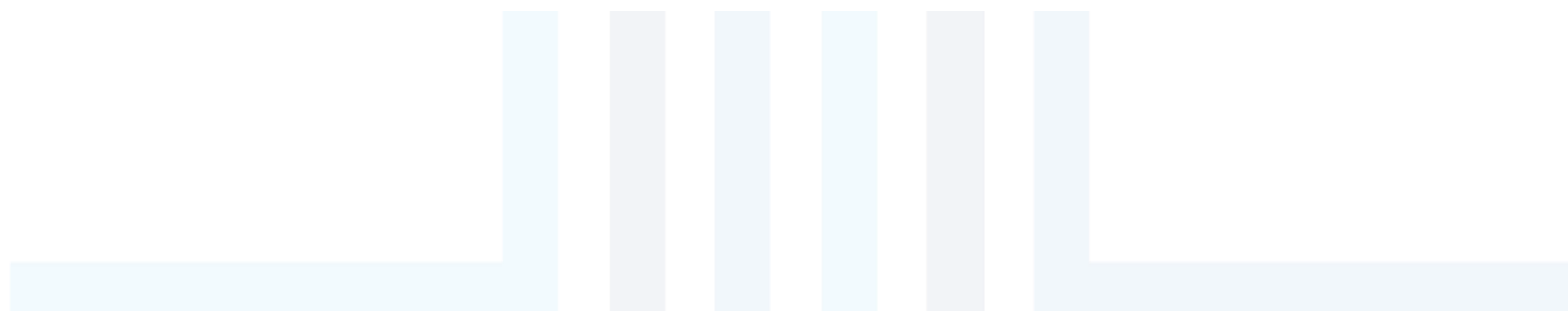
1. Go to the [System Login](#) page.
2. Click the **PASSPort Login** button.
3. Click the **Login** button.
4. Click the **Create Account** hyperlink underneath the login fields.
5. Fill in the NYC.ID account creation form and then click **Create Account**.
6. Look out for the automated validation email to validate your email address.



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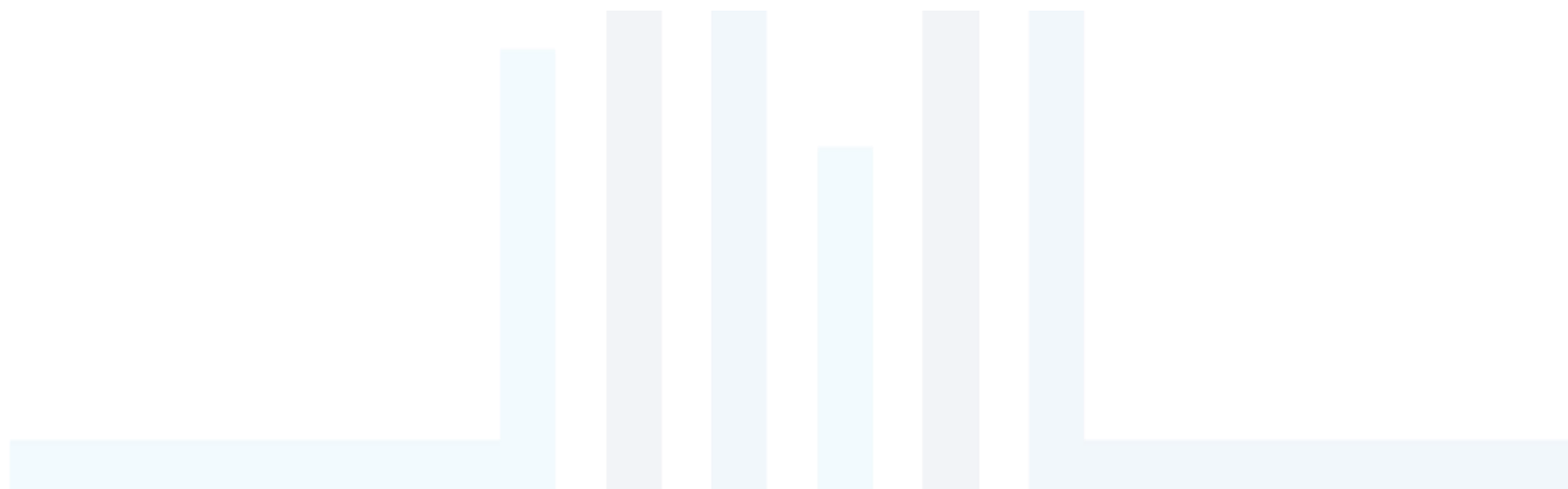
Step 2: Submit a Vendor PASSPort Account Request:

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 create a NYC.ID?



To log into PASSPort, you must use a NYC.ID in the form of an email address.

Steps to register and validate a NYC.ID:

1. Go to the [System Login page](#).
2. Click the **PASSPort Login** button.
3. Click the **Login** button.
4. Click the **Create Account** hyperlink underneath the login fields.
5. Fill in the NYC.ID account creation form and then click **Create Account**.
6. Respond to the automated validation email to validate your email address.

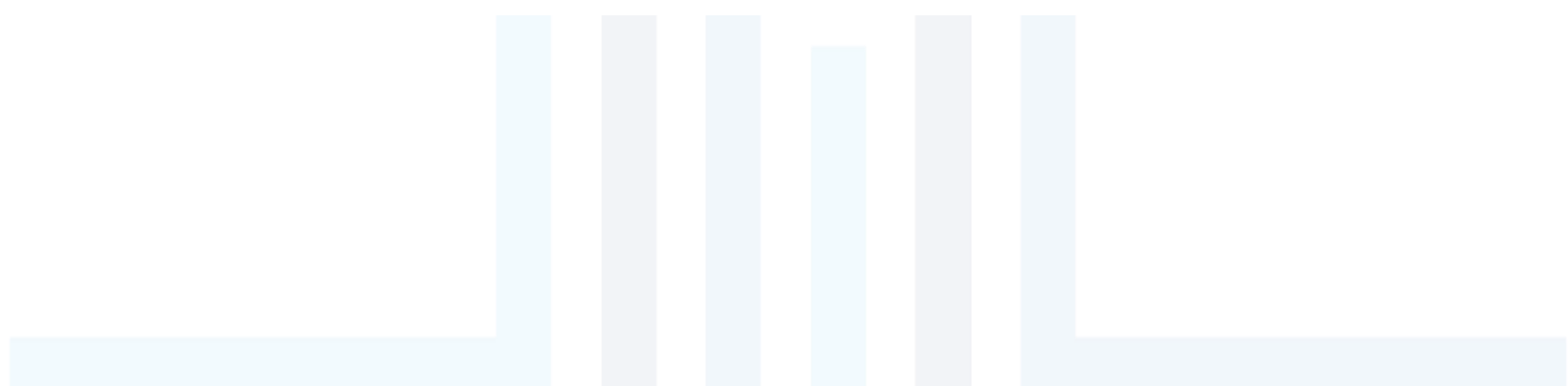


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How do I complete HHS Prequalification?



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](#).

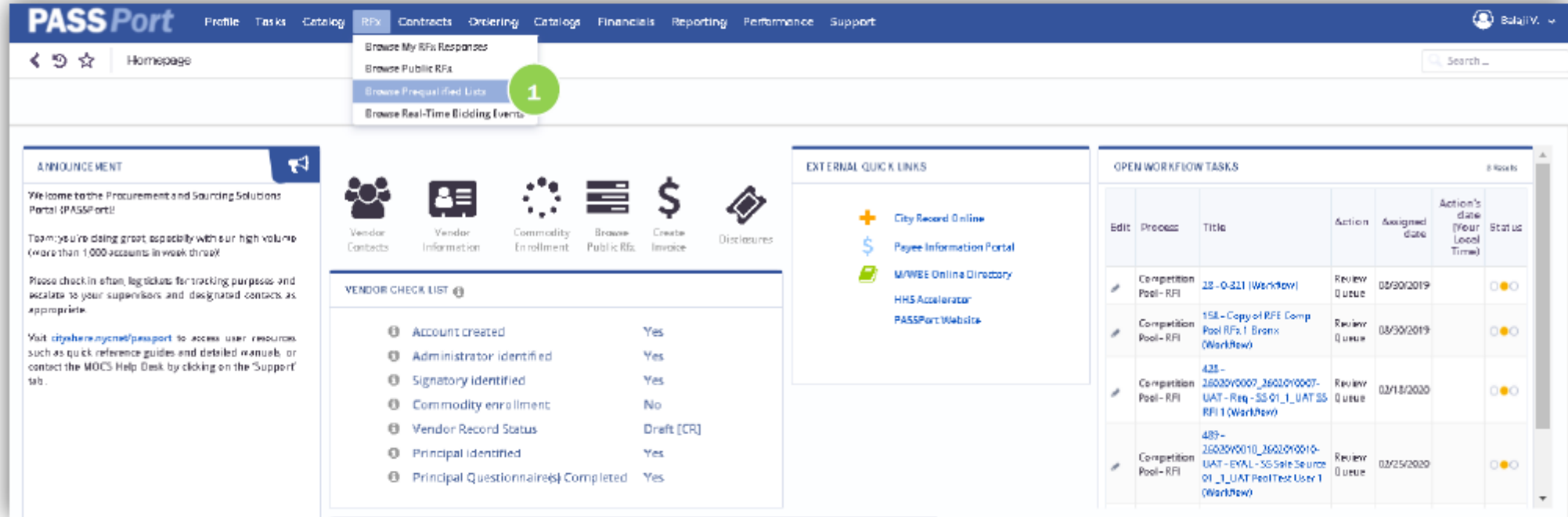


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3. Find the HHS Prequalified List

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.



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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 RFX interface. The top navigation bar includes Profile, Tasks, Catalog, RFX, Contracts, Ordering, Catalogs, Financials, Reporting, Performance, and Support. The user is logged in as Balaji V. The page title is "Browse Prequalified Lists". A search bar is located in the top right corner. Below the search bar, there are several filter fields: Keywords (with "HHS Accelerator Prequalifi" entered), Industry, Commodity, Open Date, Availability Status, Approval Required, Citywide Only, Prerequisite PQL, Current Status, Application Activity, Source, and Alerts. A "Search" button and a "Reset" button are also present. Below the filters, a table displays the search results. The table has 14 columns: PQL ID, PQL Label, Prerequisite PQL, Managing Agency, Citywide, Industry, Commodity, Open Date, Availability, Approved Vendors, Source, Current Status, Application Activity, and Qualification Expiration Date. One result is shown: PQL000066, HHS Accelerator Prequalification, with a status of "Approval Required" and "None" for Application Activity.

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.



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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 : 0
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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| |

Overview

Questions

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: 06/11/2021
Source: PASSPort Close Date:
Approved Vendors:

VENDOR STATUS

Application ID: PQA000106
Current Status:
Application Activity:
Qualification Expiration Date:

DESCRIPTION



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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, a dark blue navigation bar contains the 'PASSPort' logo and a menu with items: Profile, Tasks, Catalog, RFX, Contracts, Ordering, Catalogs, Financials, Reporting, Performance, and Support. On the right side of this bar, a user profile icon and the name 'Balaji V.' are visible. Below the navigation bar, a breadcrumb trail shows 'PQA000106:HHS Accelerator Prequalification'. To the right of the breadcrumb is a search bar and a print icon. A row of action buttons is located below the breadcrumb: 'Save', 'Save and Close', 'Submit for Review', 'Cancel Application', and 'Close'. On the left side, a vertical sidebar menu includes 'Overview', 'Questionnaire', 'Documents', and 'Application History'. The main content area features a 'Business Information' section with a progress indicator '4' in a green circle. This section includes a 'Corporate Structure' dropdown menu with 'Nonprofit' and 'For Profit' as options. To the right of the main content is a 'CREATION BY IMPORT' section with a 'Drop here your answer (in Excel format)' area, an 'Upload (in Excel Format)' button, and two download options: 'Download in Excel 2007-2010 format (.xlsx)' and 'Download in Excel 197-2003 format (.xls)'.

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.

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 'Belqil V.'. The breadcrumb trail shows 'PQA000106:HHS Accelerator Prequalification'. Below the breadcrumb are buttons for '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 and highlighted with a green circle containing the number '5'. The main content area displays a table titled 'REQUIRED DOCUMENTS'. The table has columns for Document Type, Document Label, Document Name, Last Modified By, Last Modified Date and Time (Your Local Time), Status, Download, and Validity. A single row is listed with a pencil icon in the Document Type column, which is highlighted with a green circle containing the number '6'. The row details are: Document Type: Financial Statement or Report; Document Label: Filings Documents (i.e. Charities or Financial Statement); Document Name: ; Last Modified By: ; Last Modified Date and Time: ; Status: Pending upload; Download: ; Validity: . Below the table, it indicates '1 Result(s)'.

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

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**.



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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.

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)



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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

DUE Wednesday, February 19th, 2025

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



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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!

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/>

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CLICK 'REQUEST HELPDESK SUPPORT'
TO COMPLETE FORM