



Payment Administration Partner Information Session

May 26, 2022
11:00am to 12:00pm CT

Welcome

Introductions:

- ❑ Pete Subkoviak, Director, Guaranteed Income and Economic Mobility
- ❑ Dominic Tocci, Deputy Bureau Chief
- ❑ Jessica Gallagher, Senior Consultant, Guidehouse

Agenda

- About Cook County
- Cook County Promise
- Program Goals
- Payment Administration Partner Role
- Services Required
- Selection Criteria
- How to Apply
- Requirements
- Online Application
- Budget Template
- Subcontracting
- Timeline
- Q&A

About Cook County

With a population of approximately 5.3 million people, **Cook County, Illinois** is the second most populous county in the nation. The Cook County region contains 134 municipalities, the largest being the City of Chicago – where the County seat and its central offices are located. The City of Chicago and the surrounding suburban municipalities account for approximately 85% of the County's 946 total square miles.

The **Bureau of Economic Development (BED)** works to foster economic development and job growth across Cook County and will oversee the Guaranteed Income Pilot Program and coordinate among all partners.

The County is seeking grant applications (proposals) from agencies who can fulfill the required Scope of Services for supporting the Cook County Promise Guaranteed Income Pilot.

The Cook County Promise Guaranteed Income Pilot will provide no-strings-attached \$500 monthly cash payments to 3,250 Cook County residents for 24 months. The County is aiming to open participant applications in Fall 2022, with first payments beginning in Winter 2022.

The **Payment Administration Partner** will be responsible for setting up and administering a user-friendly guaranteed income participant application, offering direct assistance and troubleshooting during the application window, conducting lottery selection, eligibility verification and benefits counseling, distributing and tracking monthly cash payments, and capturing metrics and required data documentation for reporting and evaluation purposes.

Program Goals

- ✓ Help participants recover from economic impacts of COVID-19, achieve financial stability, and improve economic mobility
- ✓ Improve participants' mental and physical health
- ✓ Understand how guaranteed income impacts immediate participants, as well as community members overall
- ✓ Understand how guaranteed income impacts local small businesses and organizations
- ✓ Understand how, in the context of the suburbanization of poverty, guaranteed income may uniquely impact suburban populations
- ✓ Help Cook County build the long-term systems and infrastructure necessary to run a permanent Guaranteed Income Program

Payment Administration Partner Role

Cook County seeks a **Payment Administration Partner** to administer the Guaranteed Income Program application, lottery selection and eligibility verification, and monthly cash distribution processes, and the required data collection elements therein. The primary objectives of the Payment Administration Partner are to:

Set up an online, user-friendly application, designed for completion via computer, tablet, or a smart phone.

Offer direct application assistance and troubleshooting via phone and/or online chat to applicants (during normal business hours at a minimum) such that the average wait time for assistance does not exceed five minutes.

Keep applicants updated and informed on the status of their application, and whether additional eligibility documentation or other information is necessary.

Create a real-time dashboard for the County and other program partners to track and monitor application submissions, the lottery process, and cash distribution metrics.

Work with the County to ensure eligibility criteria will accurately target populations of greatest need

Work with the County and the Evaluation Partner (University of Chicago) to capture all necessary data for reporting and evaluation

Services Required



Pre-Application Period

- › Set up and host the participant application portal and staff up as necessary to meet anticipated demand
- › Work with the County and the Evaluation Partner to ensure the application will capture all necessary metrics
- › Coordinate with the Outreach and In-Person Application Assistance Partner(s) to train them on the application process



Application Period

- › Run the application portal and address any backend technological issues that may arise
- › Clearly communicate with applicants about the status of their application, timeline, and whether more information or documentation is needed
- › Be in regular communication and coordination with the Outreach and In-Person Application Assistance Partner(s) regarding any issues



Lottery

- › Run a lottery to select participants
- › Confirm eligibility of applicants
- › Review applicant and recipient demographics with the County to ensure equity
- › Create a waitlist of suburban Cook County residents and a waitlist of City of Chicago residents
- › Work with the Evaluation Partner to create a representative control group

Services Required



Enrollment and Benefits Counseling

- › Enroll participants, confirm preferred payment option (direct deposit, debit card, e-debit card), sign and process any necessary paperwork
- › Conduct a benefits counseling session with each participant to review which public benefits they are enrolled in and ensure they understand which benefits will be impacted by their participation



Payment Administration

- › Set up each participant with their preferred payment method and distribute the monthly payments
- › Create and administer an online portal that each participant can use to track their payments and communicate with staff with any questions or when payment problems arise
- › Host a real-time dashboard for the County to track payment and spending data



Reporting and Evaluation

- › Collect all data necessary for federal reporting guidelines, Cook County program metrics, and additional evaluation data as determined by the Evaluation Partner and approved by the County

Selection Criteria

Below are some of the criteria that will be used to score and evaluate applications:

Criteria	Points
Relevant Experience, Program Design, and Technology Systems <ul style="list-style-type: none">• Experience implementing and managing large-scale, public-facing financial assistance programs• Ability to run a randomized lottery system, conduct eligibility verification, enroll, and onboard participants, administer monthly payments, and track program data• Strength of existing technology systems, capable of collecting and hosting secure participant and performance data• Clarity, accessibility, and thoughtfulness of program design	60
Organizational Capacity <ul style="list-style-type: none">• Clear staffing plan with qualified staff responsible for managing program components• Ability to manage subcontractors (if relevant)• Strength of existing infrastructure, systems, and processes for monitoring program expenditures• Ability to meet federal reporting requirements	25
Performance Management <ul style="list-style-type: none">• Clear evidence of strong past performance• Experience with data-driven performance management	15

Selection Criteria

Below are some of the criteria that will be used to score and evaluate applications:

Criteria	Points
Equity and Cultural Competency <ul style="list-style-type: none">• Demonstrated commitment to equity and inclusion• Experience working with priority communities• Accessibility of program systems to diverse audiences	15
Permanency and Long-Term Potential <ul style="list-style-type: none">• Long-term potential of proposed services• Ability to think proactively and creatively and bring unique solutions to build toward project permanency	5
Budget Justification <ul style="list-style-type: none">• Demonstrated financial capacity for all program components• Clear and reasonable costs	5
Total Possible Points	125

How to Apply

1. Download and review the 2022 Guaranteed Income Payment Administration Overview PDF
2. Download the Payment Administration Partner Grant Application Word Document and prepare your application, as well as any required or supplemental documents (including the corresponding Guaranteed Income Partner Application Budget Template). **Applicants may provide their narrative responses directly in the application document or create a separate document that includes responses to all sections and questions.** Completed applications may be submitted as Word Documents or PDFs.
3. Upload your completed application form, all required attachments, and any supplemental materials before the deadline at <https://www.cookcountyil.gov/service/promise-guaranteed-income-pilot-payment-administration-application>.

**APPLICATIONS DUE:
Friday, June 10, 2022
5:00pm CT**

The following documents are available at <https://www.cookcountyil.gov/promise>:

- 2022 Guaranteed Income Payment Administration Overview (PDF)
- Guaranteed Income Partner Application Budget Template (Excel)
- Payment Administration Partner - Grant Application (Word)

Requirements



*Required

Online Application

Organization Name *

Organization Mailing Address *

Organization City *

Organization State *

Organization Zip Code *

Organization Website *

Make sure you have all materials ready to submit – you will not be able to save an in-progress application.

Online Application

FILE UPLOADS

Use the following section to upload the required files for this submission. Please have ALL your files ready to upload when you submit your application, as you cannot save and continue later. All files marked as REQUIRED must be uploaded when submitting your application.

Completed Application *

[REQUIRED] Attach your completed grant application document. Incomplete applications will not be considered.

No file chosen

One file only.
25 MB limit.
Allowed types: , pdf, doc, docx, .

Budget Form and Narrative *

[REQUIRED] Upload your completed budget form and narrative.

No file chosen

One file only.
25 MB limit.
Allowed types: pdf, doc, docx, xls, xlsx, zip.

Key Personnel *

No file chosen

[REQUIRED] Identify key personnel committed to this project.
One file only.

Make sure you have all materials ready to submit – you will not be able to save an in-progress application.

Budget Template



Requirements

- ✓ Build a budget for the entire duration of the project
- ✓ Complete expense breakdown and narrative for each year
- ✓ Provide justification for each proposed cost in the budget
- ✓ Submit budget in Excel

Budget Template (Excel) (includes both Summary Form and Narrative Form)

	A	B
1	Guaranteed Income Partner Application - Budget Summary Form	
	<u>Applicants are required to complete and submit this Budget Form (A) and corresponding Budget Narrative Form (B) in addition to the required grant application narrative.</u>	
2	Line item detail for each category is required in the Budget Narrative. For each cost item entered the your Budget Form, please provide a corresponding explanation in the Budget Narrative. Be sure to provide sufficient detail to enable reviewers to understand all proposed expenditures.	
3		
4	Applicant Organization:	
5	Partner Role (select from drop down):	
6	Contact Name:	
7	Contact Email:	
8	Contact Phone:	
9		
10		Total Project Cost
11	Personnel	
12	Fringe Benefits	
13	Travel	
14	Equipment	
15	Materials and Supplies	
16	Subcontractors	
17	Other Direct Costs	
18	<i>Other Direct Costs (as needed)</i>	
19	<i>Other Direct Costs (as needed)</i>	
20	Total Direct Costs	\$0.00
21	Indirect Costs	
22	Total Project Budget	\$0.00

Navigation: A. Budget Summary Form | B. Budget Narrative Form | (+)



Subcontracting

- ✓ The Payment Administration Partner may apply as a single organization, or as a lead organization in partnership with subcontracting organizations.
- ✓ Subcontracted agencies must demonstrate an ability to implement designated program elements.
- ✓ The lead organization must demonstrate financial capacity and ability to comply with all administrative requirements outlined in this scope of work.
- ✓ The applicant's response must include a description of which portion(s) of the services will be subcontracted out, the names and addresses of potential subcontractors, and the expected amount of money each will receive under the Contract.
- ✓ The County reserves the right to accept or reject any subcontractor if in the County's sole opinion, it is in the best interest of the County.

Timeline

Wednesday, May 18, 2022	Applications available at https://www.cookcountyil.gov/promise
Thursday, May 26, 2022, 11:00am- 12:00pm CT	Guaranteed Income Payment Administration Partner Information Session (slides posted by 5:00pm CT)
Tuesday, May 31, 2022 by 5:00pm CT	Questions Due Date <ul style="list-style-type: none">• Questions can be emailed to guaranteedincome@cookcountyil.gov
Friday, June 3, 2022 by 5:00pm CT	Q&A posted online at https://www.cookcountyil.gov/promise
Friday, June 10, 2022, 5:00pm CT	Submission Due Date <ul style="list-style-type: none">• All applications must be submitted electronically• Late submissions will not be considered

Questions?

Visit <https://www.cookcountyil.gov/promise> for more information and to apply to become a partner organization.

Visit <https://www.engagecookcounty.com/promise> to sign up for general e-mail updates on the program.



Contact: guaranteedincome@cookcountyil.gov

Appendix A: Application Checklist

Category	Requirements
Completed Application*	<input type="checkbox"/> Attach your completed grant application.
Budget Form & Budget Narrative*	<input type="checkbox"/> Applicants shall provide a detailed budget that includes a cost breakdown & narrative. Please use the provided budget template.
Key Personnel*	<input type="checkbox"/> Applicants must identify key personnel committed to this project.
501(c)(3) IRS Determination Letter*	<input type="checkbox"/> Applicants shall submit a copy of their IRS Determination Letter or Affirmation Letter exhibiting that the Corporation is tax exempt under 501(c)(3) or 501(c)(4) <input type="checkbox"/> If you are a for-profit agency, upload documentation of your for-profit status and corporate structure.
List of Board of Directors*	<input type="checkbox"/> Applicants must include a list of their Board of Directors
Copy of Articles of Incorporation <i>(recommended)</i>	<input type="checkbox"/> Copy of Articles of Incorporation or Amended Articles of Incorporation.
Certificate of Good Standing <i>(recommended)</i>	<input type="checkbox"/> For applicants in the State of Illinois, please submit a Certificate of Good Standing. For applicants outside of Illinois, please submit a certificate of similar state documentation.
Most Recent Financial Statement or Audit*	<input type="checkbox"/> Submit your A133 Single Audit, if applicable. Otherwise, submit your latest audited financials. If you do not have audited financials, you may submit other financial documents for consideration.
Supporting Documentation	<input type="checkbox"/> Additional supporting documentation as needed