



**Call for Grant Applications for:
Cook County Guaranteed Income Pilot:
Payment Administration Partner**

**Issued by:
Cook County Bureau of Economic Development (BED)**

**American Rescue Plan Act (ARPA) Funded
Coronavirus State and Local Federal Relief Funding (SLFRF) Program**

Date Issued: Wednesday, May 18, 2022

Submission Due Date: Friday, June 10, 2022, 5:00pm CDT

Anticipated Term: July 2022 through March 2025

Information Session: A virtual information session will be held on Thursday, May 26 from 11:00am to 12:00pm CDT. Please register by emailing guaranteedincome@cookcountyil.gov with the Subject Line: "Payment Administration Information Session."

Applicant Questions Due Date: All questions must be received by 5:00pm CDT on Tuesday, May 31, 2022. Questions can be emailed to guaranteedincome@cookcountyil.gov. Questions and responses will be posted online by Friday, June 3 at <https://www.cookcountyil.gov/promise>.

Submission Instructions: All responses must be submitted no later than Friday, June 10, 2022, by 5:00pm CDT. All applications must be submitted electronically. Late submissions will not be considered. To submit your response, please complete the Grant Application in its entirety and upload a completed version and all required attachments to the online portal here: <https://www.cookcountyil.gov/service/promise-guaranteed-income-pilot-payment-administration-application>.

Contact: guaranteedincome@cookcountyil.gov

I. Scope of Services

a. Funding Source

The Cook County Bureau of Economic Development is providing funding under the U.S. Department of Treasury's American Rescue Plan Act (ARPA), Coronavirus State and Local Fiscal Recovery Funds (SLFRF) program, to support residents and those providing services to residents to foster resiliency and recovery from the COVID-19 pandemic. Cook County Government has allocated \$42 million of ARPA funds to support a Cook County Guaranteed Income Pilot Program. Award recipients of ARPA funding are responsible for adhering to Federal award guidelines in the Uniform Guidance, a set of federal rules including administrative requirements, cost principles, and audit guidelines that apply to federal money.

b. Background

Cook County is located in the upper northeastern section of the State of Illinois and contains more than 800 local governmental units within its boundaries. With a population of approximately 5.3 million people, it is the second most populous county in the nation. The Cook County region contains over 130 municipalities, the largest being the City of Chicago which is the County seat and where the County's central offices are located. The City of Chicago and the suburban municipalities account for approximately 85% of Cook County's 946 square miles. The County's Bureau of Economic Development (BED) works to foster economic development and job growth across Cook County and will oversee the Guaranteed Income Program.

Nearly 15% of Cook County residents live in poverty, and the Chicago region has one of the nation's fastest growing rates of suburban poverty. In the past two decades, the suburban population of Cook County living in poverty has doubled. The COVID-19 pandemic had a significant and disproportionate impact on the populations facing issues of systemic poverty and economic instability. In 2020, the Bureau of Economic Development administered the Cook County Resident Cash Assistance Program as part of the County's COVID-19 Community Recovery Initiative. This 2020 initiative gave one-time \$600 payments to nearly 14,000 households that had been financially impacted by the pandemic, totaling \$8.3 million in assistance.

Research shows that regular, reliable income can help residents better address economic challenges and achieve financial stability, improved health, and economic mobility. The Guaranteed Income Program will build on the demonstrated transformative impact of similar programs in other jurisdictions around the country that have increased residents' financial stability and improved overall physical and mental health.

c. Program Description

Under the Guaranteed Income Program, Cook County plans to distribute a total of \$39 million in cash payments to eligible households in Cook County, as monthly payments of \$500 to 3,250 Cook County residents over a period of two years (24 months). Eligibility will be based on income and poverty thresholds, with additional details to be solidified with the selected Payment

Administration Partner and other program partners. The program aims to target Cook County households who are at or below 250% of the federal poverty level, a population that has disproportionately experienced significant negative economic impacts as a result of the COVID-19 pandemic. Cook County will leverage this program to assess the ability to effectively transition to a more permanent program structure once the pilot is complete, and will evaluate the long-term potential of program details, partner workflows, and application and administration systems.

The overarching goals of the Cook County Guaranteed Income Program are:

- Help participants recover from economic impacts of COVID-19, achieve financial stability, and move towards positive economic mobility
- Improve participants' mental and physical health
- Understand how guaranteed income impacts community members beyond immediate participants
- 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.

Through this call for grant applications, 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:

1. Set up an online, user-friendly application, designed for completion via computer, tablet, or a smart phone.
2. 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.
3. Keep applicants updated and informed on the status of their application, and whether additional eligibility documentation or other information is necessary.
4. 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.
5. Work with the County to ensure eligibility criteria will accurately target populations of greatest need.
6. Work with the County and the Evaluation Partner (see below for additional information) to capture all necessary data for reporting and evaluation.

In addition to the Payment Administration Partner, the County plans to bring on several other partners for this program, including the Outreach and In-Person Application Assistance Partner(s), Financial Counseling Partner, and Evaluation Partner. The County will oversee the Program and coordinate among partners, monitor progress as outlined in all contractual agreements, and be responsible for submitting reports as required by the County and federal

government. Please note, the County is planning to hold a two-day guaranteed income planning and evaluation workshop in July which will bring together all program partners.

Commitment to Equity

Equity means full inclusion of all residents in the economic, social, and political life of Cook County, regardless of race, ethnicity, nationality, age, ability, gender, gender identity, gender expression, sexual orientation, neighborhood of residence or other characteristics.

- Cook County Office Under the President (OUP)

Cook County has remained committed to an equitable distribution model¹ in its disbursement of COVID-19 recovery funding to suburban municipalities. The Payment Administration Partner will be responsible for working with Cook County to support the equitable disbursement of Guaranteed Income payments.

Priority Communities

Cook County recognizes that some populations face greater barriers to engaging with, enrolling in, and benefitting from government services and programs than others. The County seeks a Payment Administration Partner who has previous experience working with diverse and vulnerable populations who may face barriers to participation. The Partner should also be committed to equity in program design. Priority populations and communities include, but are not limited to: low-income residents, communities of color, historically divested communities, undocumented residents, non-native English speakers, parents and caregivers, and residents not currently receiving other social safety net benefits.

A successful applicant will detail prior experience working to reduce barriers to access for these populations and will incorporate strategies for reducing anticipated barriers to participation in Cook County. In its efforts to respond to the economic disparities exacerbated by the COVID-19 pandemic, Cook County aims to receive high rates of applicants from these priority communities. **While these populations are a focus of outreach efforts (with Outreach and In-Person Application Assistance Partner(s) to be contracted separately), they are not criteria for participant eligibility.**

d. Services Required

The overarching role of the Payment Administration Partner is to build and manage the necessary processes and resources to enable successful delivery of the County's Guaranteed Income Program. The Payment Administration Partner will collaborate closely with Cook County's Bureau of Economic Development, the President's Office, and the Evaluation Partner to address program goals. Specific requirements across the lifecycle of the program are included below.

Pre-Application Period: The Payment Administration Partner will set up and host an application portal and will staff up as necessary to meet the anticipated demand. Prior to

¹ <https://www.cookcountyil.gov/sites/g/files/ywwepo161/files/service/equity-distribution-white-paper-7-14-2020.pdf>. A weighted allocation model, developed with the Chicago Metropolitan Agency for Planning (CMAP), factored median income, percent of population in economically disinvested areas, COVID-19 deaths per 100,000 of population, and tax base per capita.

launching the application, the Payment Administration Partner will work with the County and the Evaluation Partner to ensure the application will capture all necessary metrics. The Payment Administration Partner will also coordinate with the Outreach and In-Person Application Assistance Partner(s) to train them on the application process so they can confidently and competently assist applicants once the application opens.

Application Period: The Payment Administration Partner will run the application portal, address any backend technological issues that may arise, offer application assistance by phone and/or online chat, and clearly communicate with applicants about the status of their application, timeline, and whether more information or documentation is needed to complete their application. The Payment Administration Partner should be in regular communication and coordination with the Outreach and In-Person Application Assistance Partner(s) regarding any issues that Partner(s) cannot troubleshoot on their own.

Lottery: Once the application period ends, the Payment Administration Partner will run a lottery to select participants in Cook County. It will review applicant and recipient demographics with the County to ensure that recipient demographics generally align with the County's equitable distribution model and/or other County-established metrics. The Payment Administration Partner will also create a waitlist of suburban Cook County residents and a waitlist of City of Chicago residents, to replace any participants who might drop out before the first payment distribution. The Payment Administration Partner will also work with the Evaluation Partner to create a representative control group for the program evaluation.

Enrollment and Benefits Counseling: The Payment Administration Partner will be responsible for enrolling participants into the Program, confirming the participants' preferred payment option (direct deposit, debit card, e-debit card), signing and processing any necessary paperwork, and conducting a benefits counseling session with each participant to review which public benefits they are enrolled in and ensure they understand which benefits will and will not be impacted by participating in the Program. If a participant chooses to drop out prior to the first cash payment, the Payment Administration Partner will randomly select a new participant from the appropriate waitlist and follow the same procedure.

Payment Administration: The Payment Administration Partner will set up each participant with their preferred payment method and distribute the monthly payments to participants. BED is prioritizing payment options that avoid fees to participants. The Payment Administration Partner will create and administer an online portal that each participant can use to track their payments and communicate with the Payment Administration Partner with questions or when any payment problems arise. The Payment Administration Partner will also host a real-time dashboard for the County to track payment and spending data.

Reporting and Evaluation: Throughout the entire process, the Payment Administration Partner will collect data necessary for federal reporting guidelines, data Cook County specifies for Program metrics, and data for the evaluation as determined by the Evaluation Partner and approved by the County.

Across all of the above program elements, the Payment Administration Partner will demonstrate their ability, and the strength of their corresponding technology systems, to collect and securely host all data and documentation necessary to effectively implement the program.

The Payment Administration Partner may apply as a single organization, or as a lead organization in partnership with subcontracting/subrecipient 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.

Cook County plans to select one lead Payment Administration Partner. The County anticipates awarding up to \$40,950,000 for the duration of the project term. \$39,000,000 of this amount will serve as pass-through grant, which shall be provided to participants in compliance with all program requirements. Up to \$1,950,000 of this amount will be awarded to the selected Payment Administration Partner and any subcontracting agencies.

e. Project Timeline

Cook County anticipates that the Payment Administration Partner will be contracted from July 2022 to March 2025. The Payment Administration Partner should be prepared to begin work in July 2022, and to launch the participant application in September 2022. Cook County plans to issue monthly guaranteed income payments from December 2022 to December 2024.

II. Eligibility & Selection Criteria

a. Eligibility

The awarded organization must have the organizational capacity to conduct the work described in this application and have the fiscal and contracting capacity, as well as the accounting and administrative controls necessary to effectively manage a large federal grant. Requirements include financial stability, fiscal solvency, ability to provide separate reporting for use of funds, and staff to oversee the scope of work and comply with the agreement.

b. Evaluation Process

An evaluation committee comprised of County personnel and other stakeholders will evaluate all complete submissions in accordance with the selection criteria detailed below. Each eligible applicant will be evaluated on the strengths of the application, the responsiveness to the selection criteria, as well as in the context of the larger goals of the Guaranteed Income Program. Successful applicants must be ready to proceed with the proposed program within a reasonable period of time upon selection, with initial program activities expected to begin by mid-July.

Cook County reserves the right to reject any application if such application is incomplete, deemed inadequate or is otherwise not in the best interest of the County.

This evaluation process may result in a short-list of submissions. The evaluation committee, at its option, may request that all or short-listed proposers make a presentation, offer customer testimonials, submit clarifications, schedule a site visit (as appropriate), provide references, respond to questions, or consider alternative approaches.

c. Selection Criteria

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
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

III. Submission Information

a. Information Session

The Bureau of Economic Development will conduct a virtual information session on Thursday, May 26 from 11:00am to 12:00pm CDT. Potential applicants are strongly encouraged to attend. Registration is required. Please register by emailing guaranteedincome@cookcountyil.gov with the Subject Line: "Payment Administration Information Session." Registrants will receive an email confirmation and a calendar invite containing a link to the webinar.

b. Deadlines for Submission

All responses must be submitted no later than Friday, June 10, 2022, by 5:00pm CDT. All applications must be submitted electronically. Late submissions will not be considered. To submit your response, please complete the below Grant Application in its entirety and upload a completed version and all required attachments to the portal here:

<https://www.cookcountyil.gov/service/promise-guaranteed-income-pilot-payment-administration-application>.

IV. Disclosures

a. General Guidelines

- i. Applicants shall comply with all laws prohibiting discrimination on the basis of race, sex, color, national origin, disability, religion, age, sexual orientation; and/or any other legally protected classification group.
- ii. All submitted applications and related materials shall become and remain the exclusive property of the Cook County Bureau of Economic Development (BED).
- iii. BED is not liable for any costs incurred by the Applicant prior to the Partner and BED signing the Agreement.
- iv. An authorized representative of the organization shall submit the application and certification and such completion and submission of an application constitutes agreement with subsequent contracting requirements and with conditions of participation in the Cook County Guaranteed Income Pilot Program as funded under the American Rescue Plan Act.
- v. BED reserves the right to reject any and all proposals that are deemed not responsive to its goals under the Cook County Guaranteed Income Pilot Program.

b. Summary of Contract Terms and Conditions

The following summary outlines terms and conditions that will be used as the basis for developing subrecipient agreements with the selected grantee.

- i. Funding: The Guaranteed Income Pilot Program is supported by funds from the U.S. Department of Treasury, under the American Rescue Plan Act (ARPA), Coronavirus State and Local Fiscal Recovery Funds (SLFRF) program.

- ii. Method of Payment: Grantee must submit invoices to BED in such detail as BED requests and on a monthly basis. BED will process payment within forty-five (45) days after receipt of invoices. Advance payments will be considered where needed.
- iii. Grant Budget: BED and Grantee shall jointly develop a detailed grant budget that is based upon and consistent with the funding source(s). Any revisions of a line item in the working budget shall be subject to approval by BED.
- iv. Grantee Qualifications: Grantee shall ensure that all agents, employees, and subrecipients or subcontractors performing the services agreed upon, meet and maintain any licensure, certification and accreditation required to carry out such services.
- v. Monitoring and Compliance: Review and evaluation of the program will be performed, and regular contact with the grantee will be maintained to both maximize program coordination and adhere to federal guidelines.
- vi. Reporting: Grantees shall submit monthly, quarterly and/or final reports pursuant to U.S. Treasury ARPA reporting requirements and Cook County requirements as developed by BED.
- vii. Legal Requirements: Compliance with the Uniform Guidance and County legal requirements will be required.

Grant Application: Payment Administration Partner

There are twelve sections to the application, as well as a list of required attachments. Please be sure to answer each question completely. Incomplete applications will not be considered. Applicants may answer directly in the provided application document or create a separate document that includes clear responses to all sections and questions.

Section 1: Primary Contact Information

- Name
- Email
- Phone

Section 2: Organization Information

- Name
- Address
- Phone
- Website
- DUNS Number
- Years of Operation
- Head of Organization
 - Name
 - Title
 - Email
 - Phone
- Has your organization ever contracted with Cook County before?
- Has your organization ever contracted with another government entity before?

Section 3: Experience & Qualifications

- a. Please describe your organization's experience distributing unrestricted cash payments within the United States, including current or past work administering large-scale financial assistance or Guaranteed Income programs, visible to a wide public audience. Please include specific examples of your ability to deliver on the project components as described in the Scope of Services section.

Section 4: Organizational Capacity

- a. Please detail your organization's current and projected workload – how many cash distribution programs is your organization currently managing? What are the fund sizes and timelines of these current programs?
- b. If selected, how will your organization adapt to meet the demands of Cook County's Guaranteed Income Pilot? What staffing and technological changes would need to be in place, and what would that timeline look like? Please include a description of your ability to meet the County's anticipated timeline of a resident application launch in September 2022 and the first payment in December 2022.

- c. Do you have an existing customer service team dedicated to assisting applicants through the application and enrollment processes? If so, please describe your customer service process in detail.
- d. Are you applying as a single agency or lead agency? Please 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.

Section 5: Equity, Inclusion, and Cultural Competency

- a. Please describe your organization's commitment to equity and inclusion. How does your organization work internally to promote and enhance equity, particularly racial equity?
- b. Please describe your organization's experience working with low-income populations and people of color in the United States. How does your organization work to connect with and empower these populations? What barriers have you faced serving low-income communities and people of color and how have you overcome them?
- c. What languages are your application portal, payment system, and customer service team set up to serve?

Section 6: Technology

- a. Does your organization have the existing technology necessary to create and host the pilot program's application portal and lottery selection process? If so, please describe it in detail. Please include a description of your ability to collect and securely host data and documentation from applicants, including eligibility verification documentation.
- b. Do you have existing technology to enroll participants and distribute cash payments? If so, please describe it in detail.
- c. Please describe your ability to track and share available payment and spending data.
- d. Do you have existing technology to create and host a back-end dashboard for the County and the Evaluation Partner to track application, selection, and payment distribution progress? If so, please describe it in detail.

Section 7: Application Administration

- a. Please briefly describe your application process. Is it designed to be completed by a smartphone or computer? Based on your experience, please indicate the volume of applicants that you anticipate for this program and your ability to handle that volume.
- b. Please describe the process by which you will screen applicants to verify eligibility. What documentation will be required of applicants, and how will applicants submit this documentation? How will your organization design the verification process to minimize

participant burden? Will there be alternative pathways to eligibility verification for participants who lack key documentation?

- c. How do you propose coordinating with the City of Chicago to ensure that no selected participant or control group member is a recipient of Chicago's, or any other guaranteed income, program?
- d. Please describe your process for controlling for and preventing fraud, waste, and abuse, including processes for the removal of invalid applications, and avoiding duplication of benefits.

Section 8: Selection Process

- a. Please describe your experience with administering a lottery process and how you would run a randomized lottery to select participants.
- b. How do you propose ensuring that selected participants are from the targeted populations and geographic locations most impacted by COVID-19 and long-standing economic disinvestment?

Section 9: Enrollment, Benefits Counseling, and Payment Options

- a. Please describe your process for enrolling potential participants and providing comprehensive benefits counseling to potential participants prior to receiving guaranteed income payments. Based on your experience, please indicate the number of people that you expect to need intensive benefits counseling and describe your prior experience with participant drop-off levels after benefits counseling.
- b. Please describe your plan to administer monthly payments to program participants, including the types of payment options you can provide and your customer services available for addressing any payment problems. BED is prioritizing payment options that avoid fees related to direct deposit and debit cards.

Section 10: Budget and Reporting

- a. Please discuss how your organization will monitor program expenditures. Include a description of your organization's fiscal monitoring procedures and any experience your organization has with federal and/or local government fiscal compliance requirements.
- b. Please discuss any experience your organization has with federal and/or local government grant reporting requirements.
- c. Please attach a completed budget form and budget narrative as part of your application submission. Be sure to specify the level of funding dedicated to each subcontractor, if applicable.

Section 11: Data and Evaluation

- a. Please provide information on the size and experience of your data team.

- b. Please describe how your team tracks and provides data and metrics – especially sensitive data with personal information – for monitoring, reporting, and evaluation. How will this data be accessed by the County and our Evaluation Partner?
- c. Please describe how your organization has previously worked with research institutions to provide necessary data and metrics for program evaluation. Does your organization already have systems and processes in place to guide the relationship with the selected Evaluator Partner? If so, please describe.
- d. Please describe your experience with data-driven performance management.

Section 12: Structuring for Permanency

- a. One of the County’s primary goals for the Guaranteed Income Pilot is to structure it in such a way that it can be transitioned into a permanent program – and serve as a model on which other local, state, and federal governments can build on. Please discuss what strategies and activities you would consider to support the County in meeting this goal.

Section 13: Attachments (*Required)

- 1. **Completed Application*** - Attach your completed grant application. Incomplete applications will not be considered.
- 2. **Budget Form and Narrative*** - Upload a copy of your completed budget form and narrative.
- 3. **Key Personnel*** - Identify key personnel committed to this project.
- 4. **501(c)(3) IRS Determination Letter*** - Applicants should submit a copy of the IRS Determination Letter or Affirmation Letter exhibiting that the Corporation is tax exempt under 501(c)(3) and 501(c)(4).
- 5. **List of Board of Directors*** - Please submit a list of your Board of Directors.
- 6. **Copy of Articles of Incorporation (recommended)** - Please submit a Copy of Amended Articles of Incorporation.
- 7. **Certificate of Good Standing (recommended)** - 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.
- 8. **Most Recent Financial Statement or Audit*** - 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.
- 9. **Supporting Document 1** - Additional supporting documentation as needed.
- 10. **Supporting Document 2** - Additional supporting documentation as needed.
- 11. **Supporting Document 3** - Additional supporting documentation as needed.
- 12. **Supporting Document 4** - Additional supporting documentation as needed.