

Request for Proposals

**Center for NYC Neighborhoods - Black Homeownership Project
Request for Proposals
Generation 2 Generation Estate Planning Program
April 2022**

Date Re-Issued: April 18, 2022

In anticipation of generous support through grant funding from JPMorgan Chase, The Center for NYC Neighborhoods (“the Center”), through its Black Homeownership Project, (“ Black Homeownership Project”) is now seeking proposals from pre-qualified Network Partners and other invited nonprofit service providers (“Applicants”) to provide estate planning services to predominantly low- and moderate-income Black homeowners in neighborhoods in Central Brooklyn and/or the North Bronx with a history of being redlined by government and financial institutions.

The Center anticipates funding five (5) Applicants with a total funding pot of \$630,000 from Oct 15, 2022 through October 14, 2023, although the Center reserves the right to offer grants totaling a different funding level and for a different time period.

Background

For many Black families in New York City, inheriting a home does not lead to sustained homeownership. Deed theft, predatory lending, and expensive entanglements with tax liens and other inherited debts are major obstacles to the safe transfer of homes across generations. In our research, we have found that estate planning resources are underutilized by Black homeowners for a variety of reasons including the lack of affordable services, distrust of the legal system, and a lack of education on the necessity of estate planning. Many Black homeowners only encounter estate planning when they are in crisis.

Priorities

The Black Homeownership Project's Generation 2 Generation Estate Planning Pilot Program aims to increase the awareness and importance of estate planning services for low-and moderate-income homeowners as a critical Black homeownership wealth preservation tool, and to expand the capacity of Black-led community-based organizations with deep community roots to deliver estate planning services. The Black Homeownership Project is soliciting proposals through a written response of up to two (2) pages from each Applicant.

Preference will be given to proposals from Applicants who identify as Black-led and serve predominantly Black low- and moderate-income homeowners in neighborhoods in Central Brooklyn and/or the North Bronx with a history of being redlined by government and financial institutions.

Proposals should clearly identify strategies for providing the following estate planning and/or outreach and engagement services:

Scope of Services

The Black Homeownership Project expects to select four (4) Applicants to provide outreach and advice to homeowners and one (1) legal services Applicant to provide legal advice and/or assistance and to lead in the development of an estate planning toolkit.

1. Outreach and Advice

- Develop an outreach plan for neighborhood-based community education and engagement
 - Lead targeted door knocking, flyering and/or phone banking
 - Partner with elected officials, faith leaders, legal service providers, and other community partners to participate in or host events, workshops, webinars, and/or presentations on estate planning for all New Yorkers
 - Identify other targeted outreach strategies based on the needs of the homeowners you serve to meet homeowners where they are

- Work with legal service program partner(s) to develop an estate planning toolkit
- Identify eligible homeowners for estate planning services
- Engage homeowners, provide group and individual advice and guidance on estate planning documents (e.g. Health Care Proxies, Control Over Remains), refer to legal services as appropriate
- Track and report outreach, advice and assistance, and homeowner outcomes

2. Legal Advice & Assistance

- Lead in the development of an estate planning toolkit, to be developed in collaboration with other selected partners.
- Train partners on how to use the estate planning toolkit to build their capacity and knowledge of how homeowners can best obtain estate planning documents (e.g. Wills, Trusts, etc.).
- Provide group and individualized legal advice and/or estate planning assistance to homeowners in Central Brooklyn and the North Bronx
- Partner with program partners to participate in or host estate planning workshops, webinars and presentations to all New Yorkers
- Track and report outreach, advice and assistance, and homeowner outcomes

Proposal Requirements:

- **Experience:**
 - For Applicants seeking to provide Outreach and Advice, please describe your organization's experience providing outreach, relevant homeowner stabilization services, and estate planning advice
 - For Applicants seeking to provide Legal Advice and Assistance, please describe your organization's experience providing estate planning advice and/or assistance

- **Approach:**
 - As appropriate, please describe your proposed:
 - Outreach and engagement strategy and how you plan to reach and connect with Black homeowners in Central Brooklyn and/or the North Bronx (see Outreach and Advice on page 2 for more details)
 - Types of advice and/or assistance to be provided (please see guidance on how to define advice and assistance below under impact)
 - Please also describe how the outreach and/or services provided will meet and help to address community needs

- **Impact:**
 - As appropriate, please detail your proposed:
 - # of homeowners to be engaged through different tactics (events, doorknocking, etc)
 - # of homeowners to be advised, (where *advised* means identifying homeowners who would benefit from estate planning, increasing homeowner awareness of what estate planning is, assessing homeowner need, walking homeowners through the toolkit and needed documents, and making recommendations and referrals to legal services)
 - # of homeowners to be assisted, (where *assisted* means providing direct legal advice and drawing up estate planning documents such as Wills)

Funded partners will be required to report detailed event attendance data as well as client-level program data to The Black Homeownership Project on a bimonthly basis, as well as interim and final financial and narrative reporting.

Applicants seeking to provide Outreach and Advice can ask for a maximum of \$120,000 and Applicants seeking to provide Legal Advice and Assistance can ask for a maximum of \$150,000. Please provide a budget using the template provided in the Appendix below.

Proposal Selection Criteria:

Proposals will be analyzed based on the following criteria:

| | |
|------------|-----|
| Experience | 30% |
| Approach | 40% |
| Impact | 40% |

Proposal Submission Process:

- **Question & Answer period** - Please send any questions to bhp-g2g@cnycn.org. Last day to submit questions is **April 27, 2022, at 5:00 PM (EDT) Amended**
- **Deadline to submit** - Submit written materials and attachments to bhp-g2g@cnycn.org, with the subject line '2022 G2G RFP [YOUR ORGANIZATION NAME]' by **May 9, 2022, at 5:00 PM (EDT) Amended**
- **Anticipated partner selection date - July 1, 2022.** After the completion of review of submissions based on the selection criteria above, the Black Homeownership Project will notify the selected respondents, in writing, with a Letter of Intent to Award regarding selection status. **Amended**

Appendix: Budget Template ([please see attachment](#))

| | |
|---|-----------------------------------|
| Organization Name: | |
| <u>Funding Source</u> | <u>Amount Requested</u> |
| The Black Homeownership Project - Generation 2 Generation Estate Planning Program | \$ |
| Center Funded Project | |
| October 15, 2022 - October 14, 2023 | |
| Personnel Costs: | |
| <u>Title/Position Employee Name</u> | <u>Total Center Budget Amount</u> |
| | \$ |
| | |
| | |
| Fringe Benefits | \$ |
| Total Personnel Costs | \$ |
| | |
| Other Than Personnel Services Costs | |
| | |
| | |
| | |
| Total Other Than Personnel Services Costs: | \$ |
| Total Project Cost | =\$(Total PS + OTPS) |

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