

Memorandum



CITY OF DALLAS

DATE June 18, 2021

TO Honorable Mayor and Members of the City Council

SUBJECT **Upcoming Office of Procurement Services Council Agenda Item #46 – Financial Empowerment Centers**

The following Office of Procurement Services item will be considered by the City Council on the June 23, 2021 Agenda:

Item Number #46: Authorize a two-year service contract for financial empowerment centers and financial stability services for the Office of Community Care – CitySquare in the amount of \$463,000.00 and International Rescue Committee in the amount of \$723,596.90, most advantageous proposers of six – Total not to exceed \$1,186,596.90 - Financing: General Fund (subject to annual appropriations)

Background

On September 23, 2020, City Council authorized the Fiscal Year 2020-21 General Fund budget, including a funding enhancement to pilot Financial Empowerment Centers programming. Financial Empowerment Centers provide access to key financial empowerment services for residents anchored in free one-on-one financial coaching from trained financial coaches. The purpose of the Pilot Program is to enable residents to access a variety of services and resources to facilitate sustained financial stability for low-to-moderate income clients. From lessons learned from this Pilot, the City will build a comprehensive implementation strategy for short and long-term service delivery options for a permanent program. The goal of the program is to collectively serve 1,000 clients with one-on-one financial coaching during each pilot year.

Procurement

The City of Dallas Office of Community Care (OCC) sought proposals via a Request for Proposals (RFP) from entities to (1) serve as Financial Empowerment Centers (FECs) service providers and to (2) provide FEC-aligned client assistance. Proposers were asked to detail a service delivery model that included financial coaching as well as tailored client services (examples below). In addition, each proposer had to demonstrate at least twelve months of relevant experience providing this type of service. Maximum levels of financial support were listed for each service category. The Evaluation Committee individually scored each of the two categories, as provided below.

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(1) Financial Empowerment Center services provides bundled one-on-one financial coaching from a trained provider with two or more Parallel Services and three or more Tailored Services. Contract award for FEC Pilot Implementation Partner Providers was based on proposals received that identify unique qualifications in servicing the following target communities:

- Cedar Crest
- Highland Hills
- Pleasant Grove
- South Dallas / Fair Park
- South Oak Cliff / Red Bird
- West Dallas
- Other (community with documented concentration (40%+ of total residents) of individuals living in poverty and/or concentration of individuals identified in Target Populations) – proposer should define the geographical boundary of the community and eligible population

The City cited a maximum level of support of up to \$375,000 for each contract for this service, for a total of up to \$750,000 in available support.

Agency	Ranking	Category 1 - FEC Score
CitySquare	1	90.8
International Rescue Committee	2	89.6
Services of Hope Entities, Inc.	3	86.0
Dallas Leadership Foundation	4	74.8
Consumer Credit Counseling Service of San Francisco dba BALANCE	5	69.4
Bratton Construction dba House of Shalom	6	48.8

(2) Financial Empowerment Center aligned Client Assistance Partner Providers will provide Client assistance services, such as financial assistance, mental health programming, benefits navigation, benefits application and enrollment support, tied to Financial Empowerment Centers awarded through this solicitation or other already established FEC's located throughout the City in eligible target areas. Client assistance services include:

- Financial Assistance Services
- Financial Assistance Services – Health Care Costs
- Mental Health Services
- Food Assistance Services
- Benefits Navigation Services, including application and enrollment

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The City cited a maximum level of support of up to \$100,000 for one contract for each service listed above, for a total support amount of up to \$500,000. Awards for each service are being made to the top scoring applicant for each service.

Agency	Ranking	Category 2 – Client Assistance Score
International Rescue Committee	1	88.2
CitySquare	2	78.8
Services of Hope Entities, Inc.	3	75.0
Dallas Leadership Foundation	4	65.6
Consumer Credit Counseling Service of San Francisco dba BALANCE	5	54.2
Bratton Construction dba House of Shalom	6	46.0

The RFP was advertised on February 11 and February 18, 2021. A pre-conference was held on February 23, 2021 and submissions were due on March 18, 2021.

Date	Actions
February 11, 2021	RFP posted via Bonfire
February 11, 2021	Outreach – 2679 invitations sent
March 18, 2021	RFP closed and submissions due
May 6, 2021	Application scoring completed
May 24, 2021	Notification of funding awards
June 4, 2021	Contract Negotiations Subrecipient Training
June 23, 2021	Council authorization of contracts

Agency	Ranking	Score	Amount Requested	Amount Awarded
CitySquare	1	Category 1 - 90.8	\$468,446.00	\$373,000.00
		Category 2 - 78.8	\$500,000.00	\$90,000.00
International Rescue Committee,	2	Category 1 - 89.6	\$374,938.00	\$371,104.70
		Category 2 - 88.2	\$391,358.00	\$352,492.20
Services of Hope Entities, Inc.	3	Category 1 - 86.0	\$375,000.00	
		Category 2 - 75.0	\$250,000.00	
Dallas Leadership Foundation	4	Category 1 - 74.8	\$333,795.00	
		Category 2 - 65.6	\$156,665.00	
Consumer Credit Counseling Service of San Francisco dba BALANCE	5	Category 1 - 69.4	\$347,776.00	
		Category 2 - 54.2	\$0	

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Bratton Construction dba House of Shalom	6	Category 1 - 48.8 Category 2 - 46.0	\$1,020,000.00 \$500,000.00	
TOTAL				\$1,186,596.90

Each organization will begin implementation of programming and services once contract negotiations have been finalized.

Should you have any questions or need any additional information, please contact myself or Jessica Galleshaw, Director of Office of Community Care, at 214-670-5113 or Jessica.Galleshaw@dallascityhall.com.



Kimberly Bizzor Tolbert
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Preston Robinson, Administrative Judge
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- Jon Fortune, Assistant City Manager
Joey Zapata, Assistant City Manager
Dr. Eric A. Johnson, Chief of Economic Development and Neighborhood Services
M. Elizabeth Reich, Chief Financial Officer
M. Elizabeth (Liz) Cedillo-Pereira, Chief of Equity and Inclusion
Directors and Assistant Directors