



**Request for Proposals (RFP)**

**Grant Opportunity for  
Strengthening the NYS Legal Ecosystem**

SUBMISSION VIA THE STATEWIDE FINANCIAL SYSTEM ONLY  
PAPER APPLICATIONS WILL NOT BE ACCEPTED

**DEADLINE: 12 P.M. (NOON) Eastern Time, July 30, 2026**  
**LATE APPLICATIONS WILL NOT BE ACCEPTED**

Applicants are strongly urged to submit applications at least 48 hours in advance of the deadline to allow for uploading information and documents to the Statewide Financial System (SFS).

**Optional Pre-Bid Conference via Zoom on Monday, July 13 at 1:00 – 3:00 pm**  
Register at <https://us06web.zoom.us/meeting/register/jgayXHeXTMuDjCCyIL6xCA>

Participation is optional; registration is required.

**420 Lexington Avenue, Room 607, New York, NY 10170**  
**(646) 865-1541 | [iola.org](http://iola.org)**

# APPLICATION OVERVIEW

## A. The IOLA Fund

IOLA’s mission is to support qualified non-profit organizations throughout New York State that will most efficiently and effectively provide stable, economical, and high quality civil legal representation to eligible clients to improve the administration of justice.

IOLA generates revenue from interest earned on New York lawyers’ IOLA trust accounts. In 1983, IOLA was established by the New York State Legislature and is administered by a fifteen-member Board of Trustees appointed by the Governor. The Trustees are assisted by a staff of eleven full-time employees located in New York City. IOLA provides millions of dollars in grants to 87 organizations that provide civil legal aid to low-income New Yorkers, furthering the goal of equal access to justice for all. For more information about these programs, visit [IOLA's website](#).

## B. About this Grant Opportunity

IOLA seeks to strengthen the civil legal ecosystem across New York State by providing general operating grants to nonprofit organizations working to increase the ability of underserved, low-income communities to obtain legal information, advice and/or representation for their civil legal problems. Grant awards will be for general operating expenses and may be utilized for strengthening organizational administration, infrastructure, or technology.

## C. Available Funding and Term

The IOLA Fund plans to award Simplified Renewal Agreements up to a total of \$2.5 million with a fifteen-month initial period and two twelve-month optional renewals for up to a total of \$2.5 million in each renewal term, for a total of up to \$7.5 million, if all options are exercised.

Individual grant awards for the initial term are expected to range from \$50,000 to \$200,000. Each award will be expected to allocate at least \$5,000 for staff training and for attendance at any IOLA sponsored convenings.

Awards are subject to available IOLA funding, the [State of New York Contract for Grants](#), and the IOLA Fund’s appropriation under the NYS Budget.

1. **Initial Term:** The initial period of performance shall be for one fifteen-month period from 11/01/2026 to 3/31/2028.
2. **Renewal Option:** : IOLA reserves the right, at its sole discretion, to renew contracts for two additional twelve-month terms from 4/1/2028 to 3/31/2029 and 4/1/2029 to 3/31/2030.

## **D. Scope of Services**

IOLA invites applications from programs pursuing any of the following outcomes:

1. Enhance civil legal services to low-income New Yorkers through innovative and cost-effective means;
2. Provide direct civil legal services either to groups of clients currently underserved by legal services, or in an area of representation (whether substantive or geographical) that cannot be or is not effectively served by existing legal services providers;
3. Provide legal, management, or operational training, or legal, management, support service, or technical assistance, or direct legal assistance, information advocacy, or litigation support to existing legal services providers; or
4. Otherwise promote the improvement of the administration of justice.

## **E. Use of IOLA Funds**

Subject to certain exceptions and circumstances, persons eligible to receive legal services with IOLA funds are limited to those whose incomes do not exceed 125% of the Federal Poverty Guidelines.

IOLA funds may not be used for any of the following purposes:

- (1) Legal assistance with respect to any criminal proceeding or any action in the nature of habeas corpus collaterally attacking a criminal conviction
- (2) Political purposes
- (3) Endowment campaign support

## **F. Eligibility**

Current IOLA grantees are not eligible for this grant opportunity.

Organizations qualified to receive IOLA grants must meet all of the following:

- Be non-profit entities, tax exempt under section 501(a) of the Internal Revenue Code;
- Have “current” registration with the NYS Charities Bureau;
- Operate within New York State;
- Have an audit mechanism that provides accountability for IOLA funds; and
- Agree to satisfy, on a timely basis, all of IOLA’s reporting requirements, including the submission of certified financial statements.

## **G. Lobbying Prohibition**

State Finance Law §139-J and §139-K restrict applicants from making contact with the procuring governmental entity with the intent to influence the governmental entity’s conduct or decision

regarding the governmental procurement (unless it is a contact within the statutory exceptions set forth in State Finance Law §139-K(3)(a)). Violations of the procurement lobbying rules can result in findings of nonresponsibility that can result in rejection of contract award and, in the event of two findings within a 2-year period, an applicant may be debarred from obtaining any governmental Procurement Contracts.

## **H. Right to Use**

Applicants shall clearly identify any portions of their application that contain proprietary information or trade secrets. Any such information will be handled in accordance with applicable laws, including the New York Freedom of Information Law (FOIL) pursuant to FOIL§87(2) and the basis for the protection, including any relevant legal authority.

Submission of an application shall be deemed to grant IOLA the right to use and disclose the contents of the application for purposes of evaluation, award, and administration, subject to applicable confidentiality protections. Absent such identification, IOLA reserves the right to treat all proposal materials as non-confidential. IOLA has the right to adopt, modify, or reject any or all ideas presented in response to this RFP.

## **RELEVANT DATES AND DEADLINES**

### **July 13, 2026: Pre-Bid Conference**

Applicants are invited to attend IOLA’s optional Pre-Bid Conference on **Monday, July 13, 2026, at 1:00 – 3:00 pm**. IOLA staff will provide a brief overview of the application requirements and answer questions from attendees. The Conference will be held via Zoom; pre-registration is required. Click the following link to register:

<https://us06web.zoom.us/meeting/register/jgayXHeXTMuDjCCyIL6xCA>

All questions and answers addressed during the Conference will be included in the written list of RFP questions and answers posted to the IOLA website as described below.

### **July 17, 2026: Questions & Answers**

Any and all questions regarding the application process must be submitted via the following Microsoft Form: <https://forms.office.com/r/LcXfhpvxfl> on or before 4:00 pm, July 17, 2026.

Oral questions will not be accepted or answered. Questions received after the deadline may not be answered. IOLA will post on its [Grantee Resources webpage](#) a final and comprehensive list of all questions and answers by July 23, 2026.

## **July 30, 2026: Deadline for Submission of Proposals**

Applications must be fully submitted through the Statewide Financial System by **12:00 pm (noon) Eastern Time on July 30, 2026**. This includes answering program questions and uploading all program documents and forms. **Once submitted, all submissions are final.**

**NOTE:** If an applicant encounters technical difficulties or otherwise cannot finalize the submission of its application by the deadline, the application **CANNOT** be accepted

**Applicants are strongly urged to set aside sufficient time and resources for submitting their applications and to submit prior to the deadline.**

# APPLICATION CONTENTS, SUBMISSION, AND INSTRUCTIONS

## General Submission Instructions

To be considered, all applicants must submit a complete application via the Statewide Financial System (SFS) by the posted deadline. For an application to be considered, applicants must be “Prequalified” in SFS as of the posted deadline for applications.

See the following New York State Grant’s Management webpage for more information on becoming Prequalified in SFS: <https://grantsmanagement.ny.gov/get-prequalified>. New York State reserves 5-10 business days from the receipt of complete Prequalification applications to conduct review. If supplementary information or updates are required, review times may be longer. We advise applicants plan accordingly and Prequalify as soon as possible.

The application on SFS consists of a series of Pages where applicants will be prompted to answer questions and upload responsive documents. Each Page should be saved as it is completed; the entire application need not be completed in one sitting. Applicants seeking to resume work on a partially completed application should go to the SFS home page and access their application in the “Grants Management – State” tile through either the “Bid Event Search” or the “Bid Response Search” (Funding Agency: IOL01, Event ID: IOL-AOJ27 ). Once all the Pages are finished and all the necessary documents are uploaded, an applicant should “submit” the application.

**IMPORTANT NOTE:** Only individuals designated with the SFS role of “**Bid Response Submitter**” are authorized to submit applications via SFS. Please review your designated role before preparing your application. Forward all SFS questions to [helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov) or call 855-233-8363. Please note the SFS Helpdesk may take several business day to respond to inquiries and plan accordingly.

**Professional Judgment:** Where actual data is not available, applicants should use best estimates based on available data and their professional judgment.

**Support and Training Programs.** Applicants that provide support and training services to other organizations should reference the direct and indirect approval from the recipients of their programs in the narrative discussions of community need (Part A.) and program description (Part C.).

**Additional Pages** Do not submit any additional materials beyond those requested. Do not submit letters of recommendation. Do not submit MOUs. Cited information (e.g., hyperlinks to websites or photos) may not be considered. Footnotes and endnotes are permitted but count toward the page limits.

## Program Information

See instructions below for SFS fields and how to upload narrative responses.

Under “Step 1”, in the Bidder Contact Information section, enter the name, email, and telephone of the best contact person for the application. Click “Site/Project Address” link to enter the address of your organization’s main administrative office. This information must be entered before saving the page.

The **Event Questions** will prompt you to provide narratives of the following:

1. Community Need
2. Organizational Strength
3. Program Description
4. Financial Narrative

Please draft and then upload documents responsive to each question, adhering to the indicated page limits and incorporating the headings referenced below (single-spaced, one-inch page margins, 12-point font.) All documents must be uploaded in PDF file format.

### **A. Community Need (up to 2 pages)**

Indicate the client needs and/or gaps in community services to be addressed by the legal program, including a description of the geographic area and target population. Where possible, support your answer with demographic and statistical data

### **B. Organizational Strength (up to 3 pages)**

#### **1. Mission and Management**

Describe the organization’s mission and principal activities. Discuss how the organization’s mission and principal activities connect with serving the civil legal needs of low-income communities or improving the administration of justice.

Describe the organization’s governance and management structure, including board composition, relevant experts, and client/community involvement.

#### **2. Training, Supervision & Quality Control**

Describe training or professional development offered to your staff, management, volunteers, and board members. You may include training to be supported by this grant.

Describe the methods for staff supervision and ensuring high quality services, including support for paralegals, law students and other non- attorneys involved in this service delivery. Where applicable, describe provisions for ensuring confidentiality of client information.

## **C. Program Description (up to 5 pages)**

### **1. Narrative Summary of The Legal Program To Be Funded**

Describe the kinds of services to be provided, to whom they will be provided and where the recipients of those services reside. Describe in detail all activities to be supported by IOLA funding, including how the proposed services will be delivered and whether and how technology will be used to deliver services.

### **2. Cooperative Efforts**

Identify other legal services providers, private bar associations, or community-based organizations that you partner with to support the legal services ecosystem in your community or region. Describe how you partner with these organizations, including any proposed sub-contracts of IOLA funding.

### **3. Achievements in Last Fiscal Year**

Summarize your most significant achievements during the last fiscal year ending March 31, 2026. Include, if applicable:

- Number of cases closed
- Numbers of individuals benefitted
- Numbers of educational events held or events where pro se assistance was offered
- Total financial benefit obtained for clients

## **D. Financial Narrative (up to 3 pages)**

### **1. Current Financial Status**

Describe your organization's current financial position. Indicate any operating reserves, capital projects, operational surplus/deficit. Clarify any issues that may appear on your most recent audit. Describe your financial staff, including number of staff members, any accreditations (e.g., CPA), whether in-house or outside consultants, etc.

### **2. Other Funding**

Describe sources of revenue for your legal program in addition to funds sought from IOLA. Include funder names, amounts, and whether funding is committed or pending.

### **3. Training & Travel Expense**

Each grant award under this RFP will be expected to allocate at least \$5,000 for relevant staff training and for attendance at any IOLA sponsored convenings. Indicate your proposed total allocation for staff training and travel expenses and briefly describe.

Note: IOLA is currently anticipating convening a 1-day event in New York City in January 2027 and a 2-day event in Albany during the summer of 2027.

#### 4. **Capacity Building (optional)**

Grant awards may be allocated for strengthening organizational administration, infrastructure, or technology. Please identify what amount of your proposed IOLA grant would seek to allocate for this purpose and describe the capacity building activities your organization would pursue.

## **Budget Information & Instructions**

### **Grant Budget**

IOLA expects to award up to a total of \$2.5 million for a fifteen-month initial period plus up to \$2.5 million for each of two optional twelve-month renewals. Individual grant awards for the initial term are expected to range from \$50,000 to \$200,000. Each award will be expected to allocate at least \$5,000 for staff training and for attendance at any IOLA sponsored convenings.

**The grant request entered in SFS should indicate the total amount requested for the initial fifteen-month term of the contract.**

The grant request should be entered in the “Lines” chart on the “Event Details” page in the “Your Unit Bid Price” field. This must match the total grant funds requested in the SFS Budget.

The SFS Budget should include proposed **sub-totals for each pre-defined budget category** for the fifteen-month term beginning November 1, 2026 and ending March 31, 2028.

**If awarded**, the Contractor will be required to develop and submit a detailed, line-item budget for the contract term. IOLA will provide further instructions and work with the Contractor to develop this budget after award. All detailed budgets are subject to approval.

### **SFS Instructions**

To access the SFS Budget forms, select the “Period” column link (which appears as “1”) under “Lines” in “Step 2: Enter Line Bid Responses”. This will bring you to a page called “Create Bids” where both the Budget and Workplan can be accessed through their respective links in the “Bid Event Periods” box.

Complete the “Budget Properties” page in SFS, showing only those anticipated costs related to the provision of services consistent with your Program Narrative and supported by an IOLA grant. Assume a 15-month budget, with a November 1, 2026 start date.

Note that SFS budget information is entered into the “Period Budget Summary” chart on the “Budget Properties” pages. “Period Budget Summary” Page contains a series of linked web forms accessed through the “Category Details” icon for each Budget Category where budget details, as defined below, are entered and saved.

The total amount entered in the SFS Budget must equal the amount entered in the “Your Unit Bid Price” field on the Event Details page to submit the bid response.

The Budget inputted into SFS should include anticipated costs related to the provision of services, to be charged to an IOLA grant (if awarded). The budget categories in the SFS Budget are pre-defined for Salary, Fringe, Contractual Services, Travel, Equipment, Space/Property & Utilities, Operating Expenses, and Other. The anticipated costs for each category need to be entered under the “Grant Funds” field on each respective page. Do NOT edit the pre-defined “Type/Description” field in SFS. Do NOT add additional lines.

For example, in the “Salary Category” Detail Page, enter the anticipated “Grant Funds” for Salary. This should reflect anticipated costs to be charged to the proposed IOLA grant for Salary. Leave the “Annualized Salary Per Position”, “STD Work Week (hrs)”, “% of Effort Funded”, and “# of Months Funded” fields blank. Only the “Grant Funds” field needs to be filled out in the SFS Budget.

The “Narrative” text boxes in the SFS Budget webpages do not need to be filled out. Narrative detail should be reflected in the Financial Narrative.

## **Budget Category Guidance**

IOLA supports sound infrastructure that enables civil legal aid programs to flourish. Applicants may seek funding for personal services and non-personal services, including administrative expenses. Applicants are not required to have expenses for every non-personal services category.

In developing a budget request, please note the following guidelines:

“Salary” costs include all projected salaries and wages to be paid to staff—employed directly and whether part-time, full-time, or temporary.

“Fringe” costs include projected fringe benefits to be paid on behalf of employees, which may include retirement, FICA, health and life insurance, worker’s compensation, disability insurance, unemployment insurance, day care, and other payroll-related costs.

“Contractual Services” costs include service contracts that directly relate to the provision of civil legal services as described in your applications workplan. Include any subcontracts to project partners, temporary staff through a temp agency, subcontracted legal staff, trainers where the workplan calls for staff or board training, or others who provide legal services to eligible clients. (In the case of a legal services collaboration, the Narrative should include a summary description of the scope of work and the overall collaboration.)

Applicants with proposed subcontracts should pay special attention to the State of New York Contract for Grants §III.B. If awarded, all subcontracts in excess of \$100,000 must include the provisions required by NYS State of New York Contract for Grants §IV.B.(4) and be submitted to IOLA for review and approval prior to execution and a final executed copy of the subcontract must be filed with IOLA.

If the application is approved, subcontractors will be required to submit a Vendor Responsibility Questionnaire and proof of Worker’s Compensation and Disability Insurance coverage to IOLA

before a contract can be submitted for execution. Note that submitting a Vendor Responsibility Questionnaire requires the sub-contractor to have/obtain a NYS Vendor ID.

“Travel” costs include expenses associated with staff and Board of Directors travel, including attending client meetings, court appearances, community legal education presentations, staff meetings, and conferences and training events (including per diem costs, conference registration fees, and other associated costs).

Out-of-state travel expenses should be supported with a detailed justification. For example, indicate the conference names, number of staff people, and locations (if available) of any out-of-state conferences.

“Equipment” costs include any equipment that will be purchased or rented with IOLA requested grant funds. Allowable expenses may include equipment purchase, rental, lease, and/or repair. Exclude any service contracts to maintain equipment (e.g., maintenance contracts for copiers, telephone systems, etc.). Equipment service contracts should be included in “Operating Expenses.”

“Space/Property and Utilities” costs include expenses related to physical spaces, such as rent, mortgage, and utilities such as gas/oil, electricity, telephone and internet.

“Operating Expenses” costs include the general operating expenses and any service contracts to maintain equipment (e.g., maintenance contracts for copiers, telephone systems, etc.) to be supported by an IOLA grant, reasonably broken down into sub-categories (e.g., that may mirror your internal budgeting). IOLA Funds may be applied towards administrative expenses, which may be allocated according to government-approved indirect cost rates (ICR). Where an applicant does not have a government-approved ICR, a 15% *de minimis* ICR rate is allowable. Indirect Cost Rates (ICR) should be categorized as Operating Expenses. If awarded, updated proof of government-approved ICR may be requested by the IOLA periodically throughout the grant term.

## Work Plan Instructions

### Work Plan Properties

In the “Project Summary” field, enter a one sentence summary of the services you intend to offer, with reference to any region, special population or legal subject area (ex. Applicant will provide civil legal services to low-income residents of ABC Region).

### Work Plan Detail: General Instructions

The Work Plan Detail, accessed by clicking the “More Detail” tab on the “Objectives >>Tasks >> Performance Measures” chart, refers to the “Objectives”, “Tasks”, and “Performance Measures” in SFS. Applicants should:

- a) edit only those Performance Measures that apply to their organizations (described below). If the applicant does not provide the defined service, leave the integer “0”;
- b) enter an appropriate numeric goal in the “Performance Measure Integer” field;

Applicants should propose goals for the 15-month term beginning November 1, 2026 and ending March 31, 2028.

Applicants should set goals only for those services that they anticipate providing; applicants do not need to have a goal for every objective. Appropriate goals will vary based on the provider’s resources and the client needs in the community.

Applicants should include all activities of their entire civil legal services program, not just the portion to be supported by IOLA funding.

Applicants should assume the total proposed budget that they requested is available and awarded. If the final award differs from the funds requested, a grantee should expect to modify its Work Plan.

## Work Plan Detail: Descriptions of Objectives

Below are descriptions of the kinds of services that should be included in your goals:

### a) Individual Case Services

- Include “cases”<sup>1</sup> closed
- Include people benefitted (note: each case benefits at least 1 person)

### b) Community Legal Education

- Include people benefitted from the dissemination of legal information to individuals via attendance at outreach, group, or training presentations
- Include people who received legal education via interactive online presentations (Zoom, Facebook live, etc.)
- Exclude direct legal assistance (i.e., case services) and non-legal services (e.g., medical or shelter services)

### c) Pro Se Assistance

- Include self-represented people who received assistance at workshops or clinics, wherever located (community meetings, provider sponsored clinics, court help centers), including online forums.
- Include self-represented people who received printed pro se forms
- Include all forms that self-represented people completed using LawHelp Interactive, A2J or other publicly accessed, web-based document assembly tools you offer
- Include self-represented people at all stages (pre-litigation and court cases)
- Exclude “case” services

### d) Pro Bono Cases

- Total number of volunteers anticipated to participate in the program.
- Include attorneys, law students and other volunteers.
- Include volunteers who provide “case” services and any other services (e.g., community legal education, pro se assistance, as well as in-house services such as intake, answering phones, clerical support, accounting)

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<sup>1</sup> IOLA defines a "case" as the provision of civil legal assistance by an attorney, paralegal or other person under the supervision of an attorney (including pro bono attorneys and volunteers) to an individual with a legal problem. Where the same client receives legal services in separate cases, each case should be counted (e.g., where a client is represented in a fair hearing and a housing dispute, two cases should be reported if both closed during the reporting period).

## REQUIRED DOCUMENTS

1. Resumes of Principal Staff
2. Organizational Chart
3. Organizational Budget: The budget should represent the applicant's current fiscal year; no particular format is required.
4. Affirmative Action Policy
5. Sexual Harassment Prevention Certification. As of January 1, 2019, the NYS Office of the State Comptroller (OSC) requires that all applicants provide a certification affirming compliance with the Bureau of Contract's [Contract Advisory #26](#). Applications that do not contain a certification may not be considered for award. Applicants are strongly encouraged to use the OSC approved form (EO 177), although alternative certifications in compliance with the [New York State Guide to Financial Operations XI.18.I](#) will be accepted.
6. Client Eligibility Guidelines or Case Acceptance Policies
7. Client Grievance Procedures
8. Documentation of Current Professional Liability Coverage: No particular format is required to establish proof of current professional liability coverage (an ACORD form IS acceptable). Ensure that the applicant's name and FEIN are identical to the name and FEIN on the proof of coverage. Do **NOT** upload your entire policy.

Applicants that do not provide direct client services (e.g., those that provide support or technical assistance to the legal services delivery system) and, therefore, do not have Documents #6 and #7 should submit a statement to that effect and include any comparable policies such as membership eligibility or priority for support services, grievance or termination policies, etc.

To submit required documents in SFS, upload a PDF of the document to its respective Event Question field. DO NOT upload password protected files.

### **ALL FILES MUST BE UPLOADED IN PDF FILE FORMAT.**

Files uploaded in formats other than PDF may not be considered with the application and the application may be considered incomplete and ineligible.

# REVIEW, AWARD, AND REPORTING PROCESSES

## Application Evaluation

Application will be evaluated as indicated below.

### Project Evaluation (80 points)

- Community Need (20 points)
- Organizational Strength (20 pts)
- Program Description (40 pts)

### Financial Evaluation (20 points)

- Financial Strength (10 pts)
- Program Budgeting (10 pts)

### Total Available 100 Points

Applications scoring under 75 points will not be considered for funding.

Applications with scores of 75 points and above are eligible for, but not guaranteed, funding.

For information about factors that the IOLA Board of Trustees considers in awarding grants, please see 21 NYCRR Part 7000.12(c).

## Award Notification

Successful and unsuccessful applicants will be notified via email to the contact indicated in the “Bidder Contact Information” fields.

## Debriefing Opportunity

A debriefing is available to any unsuccessful applicant, which should be requested in writing to [IOLAGrants@iola.org](mailto:IOLAGrants@iola.org) within 15 calendar days of the public announcement of the grant award on the IOLA Fund website. A debriefing will be scheduled within 10 calendar days of IOLA’s receipt of the written request or as soon thereafter as may be practicable under the circumstances. Any bid protest should be submitted to the Office of the State Comptroller pursuant to 2 NYCRR Part 24.1.

## Reporting Obligations and Payment Schedule

IOLA grantees will be required to submit quarterly and annual progress reports and reimbursement vouchers, as well as other reports or information required by IOLA.

Payments will be made quarterly, within approximately 30 days after the close of the quarter, after receipt and approval of progress reports and reimbursement vouchers by IOLA (with supporting expense documentation, if requested), with final payment made 30 days after receipt and approval of the final report. Awards are subject to available IOLA funding, the State of New York Contract for Grants, and the IOLA Fund's appropriation under the NYS Budget.

All reports and vouchers, including any supporting expense documentation, may become subject to the Office of the State Comptroller or SFS procedures.

## **NEW YORK STATE CONTRACT REQUIREMENTS**

### **At Time of Grant Application**

#### **SFS Registration**

Applicants must be registered with the New York Statewide Financial System (SFS) and provide their Identification Number at the time of application. Proper role access will be required to enter and submit an application.

To register and to find additional information:

[http://www.osc.state.ny.us/vendor\\_management/index.htm](http://www.osc.state.ny.us/vendor_management/index.htm)

#### **SFS Prequalification**

Prequalification is a required condition to apply for a grant. Additional information, including online tutorials, can be found on the Grants Management website (<https://grantsmanagement.ny.gov/get-prequalified>). Specific questions about the prequalification process can be directed to IOLA staff ([IOLAGrants@iola.org](mailto:IOLAGrants@iola.org)) or the SFS Helpdesk at [Helpdesk@sfs.ny.gov](mailto:Helpdesk@sfs.ny.gov) or 855-233-8363.

Applicants are strongly urged to become familiar with the Grants Management functionality in SFS. Please visit the [Vendor SFS Transition Page](#) to access training videos, PowerPoint Presentations, and other system instructions.

### **After the Grant Award**

#### **NYS Attorney General's Charities Bureau Registration**

IOLA grantees must be registered with the Attorney General's Office as a charitable organization by the time of contracting. To determine the status of your Charities Bureau registration and to find additional information: [http://www.charitiesnys.com/charities\\_new.jsp](http://www.charitiesnys.com/charities_new.jsp).

IOLA grantees are required to keep their registration up to date at all times throughout the term of the contract. Failure to keep “current” with the Charities Bureau may result in withheld payment, rescission, or termination of the contract.

### **NYS Comptroller’s Vendor Responsibility Questionnaire**

New York State Finance Law requires that state agencies award contracts to responsible vendors, including not-for-profit corporations, which is determined based on information provided by the vendor through the NYS VendRep System. All Vendor Responsibility Questionnaires must be dated within six months of the contract execution date and the determination that an applicant is a responsible vendor is a condition to final execution of a grant contract with IOLA. To enroll or to update an existing Questionnaire in the VendRep System:

<http://www.osc.state.ny.us/vendrep/index.htm>

IOLA grantees are required to re-certify the Vendor Responsibility Questionnaire at least every six months and upon IOLA’S request throughout the term of the contract.

### **Insurance Documentation**

In connection with contract execution, IOLA grantees will be required to submit proof of current insurance coverage for the following (ACORD forms are not acceptable):

- Workers’ Compensation (Form C 105.2), and
- Disability (Form DB 120.1)

IOLA may request proof of current insurance coverage for Workers’ Compensation and Disability and Paid Family Leave benefits throughout the term of the contract.