

WilliamPennFoundation

Request for Proposals

Connecting Families with Public Benefits and Tax Credits

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Introduction

The William Penn Foundation (WPF) has a long history of investing in efforts to improve the lives of young children in Philadelphia. The Foundation’s Children and Families program was created to expand access to programs and resources that support the healthy development and academic success of young children, ages 0 to 8, in Philadelphia. A full description of the Children and Families program, its goal, and all of its objectives can be found on the Foundation’s website. This specific Request for Proposals (RFP) was created to help organizations to advance the following objective:

By 2035, WPF-funded efforts will connect 25,000 families with young children with public benefits (e.g. SNAP, WIC, Medicaid enrollment, TANF, and utility assistance) and tax credits worth at least \$75 million.

There are many publicly funded programs that are designed to help children and their families to meet basic needs such as medical care, nutrition, utilities, or income supports. Unfortunately, families and the local organizations who serve

them have told us that securing and maintaining access to these programs can be challenging. For this reason, we are supporting efforts to proactively connect families with programs to which they are entitled.

The Foundation recognizes that there are many ways that organizations and communities can contribute to advancing this objective. With that understanding, there are few limitations on the project designs or applicants' approach to addressing this issue. For example, proposals may focus on direct service, policy or system change, outreach and education, or other ways to advance the objective. Proposals may have a small geographic focus or may seek to make change on a citywide scale.

Regardless of the approach, all applicants should describe a compelling explanation for how their proposed work will advance the objective above. This RFP seeks project proposals that will advance this objective and make tangible improvements in the quality of life for residents of Philadelphia. The specific criteria that will be used to assess all proposals can be found on page 6 of this document.

Why is the Foundation using a Request for Proposals to advance this objective?

The Foundation has chosen to advance this objective using a Request for Proposals for several reasons. First, we believe that stakeholders across the region have a great deal of expertise and experience that can be supported to make progress on an objective that we heard was important to communities in our region. We want to hear about the impactful projects that are underway or could get underway and need funding. Second, we want to be as transparent as possible about the opportunity for non-profit organizations in the region to secure funding for work to advance this objective. Third, we heard from applicants and grantees in the past that our grant application process was overly burdensome, had unpredictable timelines, and did not provide sufficient information about the funding availability or the criteria used in selecting grantees. Fourth, we heard that applicants wanted an opportunity to show Foundation staff their work, not just tell them about it. The RFP process, including site visits as described below, is part of our effort to address all of this important feedback and to align with the Foundation's grantmaking values (as detailed on our website).

This RFP seeks project proposals that will connect families with public benefits and make tangible improvements in the quality of life for young children and their families in Philadelphia.

Background

Due to rising living costs and other barriers to economic mobility, many Philadelphia families face economic challenges.

A study conducted by the Urban Institute in 2024, entitled "Accessing Public Benefits in Philadelphia," suggests that families need simple, convenient ways to apply for benefits and individualized support to eliminate barriers to access to benefits.

Decades of research show that programs such as SNAP and the earned income tax-credit (EITC) help in the short-term to stabilize families and reduce household stress as well as improve children’s health status and educational success over the long-term. Removing these barriers not only benefits families and their children but also strengthens the community, fostering equity, economic empowerment, and resilience.

\$450 million

in federal and state benefits is left unclaimed annually by Philadelphians.¹

¹ Benefits Data Trust, 2023



Opportunity Overview

WPF would like to support efforts that increase the number of individuals in Philadelphia who are able to access the public benefits and tax credits for which they are eligible. Funding will be limited to projects that will positively impact families with young children, ages 0-8, living in the City of Philadelphia.

We are requesting proposals for up to three years of funding. After reviewing proposals, WPF will conduct site visits and gather additional information from a limited number of organizations.

Organizations that propose projects in partnership with other applicants will be considered on their individual merits. However, the Foundation recognizes that making significant progress on the objective is difficult and encourages organizations to include partnerships that leverage complementary strengths, resources, and expertise to reach proposed goals.

Furthermore, the Foundation recognizes that there are many different tactics or approaches that could be used to advance the objective stated above. All proposals that meet the review criteria described below are encouraged.

WPF has \$7.5 million available to advance this objective at this time. There is no minimum or maximum amount of funding that organizations may request. The grant amount requested should be commensurate with the contribution that the project will make to the overall objective.

At least \$1 million of the total amount awarded under this RFP will be reserved for grants to organizations that have budgets under \$1 million per year and/or are led by individuals who are members of groups with a history of discrimination or exclusion.

Eligibility

Applicants must be recognized by the Internal Revenue Service as 501(c)3 public charities or operate under a public charity fiduciary. Public charities include community-based organizations, schools and educational institutions, and other types of public-serving groups. Government entities are also eligible to apply.

Proposed projects must occur in Philadelphia.

Review Criteria

Proposals will be judged on the criteria below. Applicants should make every effort to address these criteria in their narrative responses to the application questions.

Alignment			
Absent	Emergent	Developing	Strong
Project activities and goals are unrelated to the defined objective.	Project activities and goals may advance the defined objective, but connection is vague.	Project will make a clear but indirect contribution to advancing the defined objective.	Project will make a clear and direct contribution to advancing the defined objective.
<i>Developing or Strong Required</i>			
Program Design			
Absent	Emergent	Developing	Strong
The approach to the work is vague or unclear.	Outlines an approach to the work that describes one of the following: the organizational capacity to carry out the proposed program, a feasible plan to implement the work, or a detailed plan to track the outcomes and impact on the relevant objective.	Outlines a clear approach to the work that describes two of the following: the organizational capacity to carry out the proposed program, a feasible plan to implement the work, or a detailed plan to track project outcomes and impact on the relevant objective.	Outlines a clear approach to the work that describes the organizational capacity to carry out the proposed program, a feasible plan to implement the work, and a plan to track project outcomes and impact on the relevant objective.
<i>Strong Required</i>			
Partnerships and Collaboration			
Absent	Emergent	Developing	Strong
No identified partners or plans for collaboration.	Partners are identified but there are no clear commitments.	Some existing partnerships, a clear plan to build new partnerships, and a description of each partner's role to maximize impact.	Sufficient existing partnerships or commitments from partner organizations and a description of each partner's role to maximize impact.
<i>Developing or Strong Required</i>			
Organizational Experience			
Absent	Emergent	Developing	Strong
No implementation experience and no track record of success.	Limited implementation experience (less than two years) with advancing the specified objective and a minimal track record of success.	Some implementation experience (2-5 years) with advancing the specified objective and a track record of success in Philadelphia or other relevant cities or regions.	Extensive implementation experience (5+ years) with advancing the specified objective and a track record of success in Philadelphia and/or Pennsylvania.
<i>Developing or Strong Required</i>			
Community Engagement			
Absent	Emergent	Developing	Strong
No evidence of familiarity with the intended beneficiaries of the proposed effort and no plan for future engagement.	Minimal evidence of the applicants' familiarity with intended beneficiaries of the proposed effort, but there is a commitment to develop a stakeholder engagement plan during implementation.	Evidence of the applicants' familiarity with the intended beneficiaries of the proposed effort and there is a plan for ongoing stakeholder engagement during implementation.	Key components of the project were informed by the intended beneficiaries of the proposed effort and there is a plan for ongoing engagement during implementation.
<i>Developing or Strong Required</i>			

Additional expectations:

Community Outreach	Proposal clearly describes planned outreach efforts that minimize duplication of current efforts by other individuals and organizations and meets families where they are in communities.
Accessibility	For proposals that include direct services, planned services take place in accessible locations, during convenient times, with consistently available language supports for non-English speaking individuals.
Reach	Any proposed activities must have benefit to families with children aged 0-8 residing in Philadelphia.
Budget	The requested budget is reasonable for the proposed activities and the stated results.

Learning and Evaluation

Grantees will be expected to complete a brief written report each year describing how they have made progress toward the objective above and what they have learned during the year.

In addition, organizations funded as a result of this RFP will be convened in a Learning Community to build networks among those advancing a common objective, to share learning and best practices, and to identify ways in which progress could be enhanced. Grantees will help to determine the frequency, content, and specific goals of the Learning Community. The overhead funding included with any awarded grants is, in part, meant to help subsidize staff participation in the Learning Community.



Webinar

Interested organizations are invited to participate in an informational webinar on **Monday, July 8, 2024 at 10:00AM ET.**

Register for the webinar at <https://lu.ma/william penn foundation>

Budget

Project budgets should cover up to three years of funding and may include up to three months for planning. Organizations are encouraged to build on their existing programs, using WPF funding to supplement or enhance those efforts.

Project budgets should be all-inclusive, including any fees to partner organizations or consultants. This information can be provided in the proposal narrative.

Except in rare circumstances, total funding from WPF should not exceed 25% of a participating organization's operating budget.

All aspects of project development and execution, including planning, design, materials, community engagement, staffing, and implementation, are eligible for funding.

In rare cases, it is possible that *everything* an organization does is focused on advancing the specific objective stated above. If that is the case, an organization may be eligible for general operating, rather than project, support. If you believe that to be the case, please contact the Program Officer named below to discuss further.

The Application Process

The application process begins by completing a proposal on our online submission system at <https://wpf.my.site.com/grantee>. Submit your application by 5:00PM EST on **August 1, 2024**. A WPF team will review all proposals and will notify applicants if they have been selected to move forward in the review process. **To download a working copy of the application to draft responses, please [click here](#).**

Selected organizations will take part in a site visit with WPF staff so that the Foundation can learn more about applicants' work. Site visits will be approximately two hours in duration. We ask that organizations use this time to introduce key staff working on the proposed project, to show WPF staff where the work will take place, and to elevate the voices of the potential beneficiaries of the proposed project. Based on a combination of the written materials and the learning from the site visit, **a final slate of organizations** will be recommended to the WPF Board for consideration of their proposals.

This request or any subsequent response does not commit William Penn Foundation or the responding organization to any future funding or engagement. If you have any questions, contact Jennifer Stavrakos at jstavrakos@williampennfoundation.org

Timeline

July 1, 2024

Proposal submission period opens

July 8, 2024

Informational Webinar (see previous page)

August 1, 2024

Proposals due by 5:00PM EST

August 16, 2024

Select applicants notified that their proposals have been chosen for further consideration and a site visit. Other applicants will be notified that their proposals are not advancing in the process.

August 19 – September 6, 2024

Site visits conducted by WPF staff with selected applicants.

October 25, 2024

WPF Board review selected proposals

November 2024

Project implementation can begin