

**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 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. 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 make tangible improvements in families' access to public benefits and tax credits. The specific criteria that will be used to assess all proposals can be found on pages 6 and 7 of this document.

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

### **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 this important feedback and to align with the Foundation's grantmaking values (as detailed on our website).

# Background

Due to rising costs of living and other barriers to economic mobility, many Philadelphia families face financial 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.<sup>1</sup> Decades of research show that programs such as the Supplemental Nutrition Assistance Program (SNAP) and the Earned Income Tax Credit (EITC) help in the short-term to stabilize families and reduce household stress. These programs also improve children's health status and educational success over the long-term. Removing barriers to accessing these programs not only benefits families and their children but also strengthens the community, fostering equity, economic empowerment, and resilience.

Despite the known benefits of financial support, recent data shows that eligible Philadelphians leave hundreds of millions of dollars unclaimed annually.

**12.6% of eligible Philadelphia households in poverty do not receive SNAP.<sup>2</sup>**

**One out of five Philadelphians who could receive the EITC don't apply for a tax refund—leaving over \$100 million unclaimed every year.<sup>3</sup>**



<sup>1</sup> Coffey, A., Sonoda, P., & Wagner, L. (2024). *Accessing Public Benefits in Philadelphia*. Urban Institute.

<sup>2</sup> City of Philadelphia Office of Homeless Services. (2024). *Hunger Dashboard 2024*.

<sup>3</sup> City of Philadelphia Department of Revenue. (2025). *Earned Income Tax Credit (EITC) resources*.

# Opportunity Overview

The Foundation seeks 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.

Funding will be directed toward efforts that help families access, maintain, renew, or appeal decisions related to public benefits and/or tax credits. For example, proposals may focus on direct service, policy or system change, outreach and education, or other ways to advance the objective.

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.

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 **\$3 million available** to advance this objective through this RFP. The maximum amount of funding that organizations may request for direct expenses is \$800,000 over three years. (This does not include the overhead amount that will be added to project budgets, based on a formula described on the “How to Apply” section of our website).

## 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 and serve families who are residents of Philadelphia.

Existing grantees currently receiving funding to advance this objective cannot request additional funds for their current projects.

# Review Criteria

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

Alignment with Objective			
Absent	Emergent	Developing	Strong
Project conveys no meaningful connection to the objective.	Project would make a marginal and/or uncertain contribution to advancing the objective.	Project would make a clear contribution to advancing the objective.	Project would make a clear and significant contribution to advancing the objective.
		Developing or Strong Required	
Program Design and Feasibility			
Absent	Emergent	Developing	Strong
Proposal does not provide a clear approach to the work. Anticipated outcomes and success are not well-defined.	Proposal describes an approach to the work, but some aspects are vague, difficult to understand or seem unrealistic. Anticipated outcomes are defined, but are of uncertain achievability, based on the details provided.	Proposal provides a clear approach but could be more specific. Anticipated outcomes require further clarification to assess feasibility.	Proposal provides a clear and feasible plan to implement the work and includes a solid justification for anticipated outcomes.
		Developing or Strong Required	
Partnerships and Collaboration			
Absent	Emergent	Developing	Strong
No potential partners or plans for collaboration.	Potential partners relevant to the project are identified but there are no clear commitments.	Some committed partnerships relevant to the project, a plan to build any necessary new partnerships, and a description of each partner's role.	Sufficient committed partnerships relevant to the project, a description of each partner's role, and a track record of successful collaboration.
		Developing or Strong Required	
Organizational Experience			
Absent	Emergent	Developing	Strong
No implementation experience and no track record of success.	Less than three years of experience with advancing the specified objective and a limited track record of success.	Three to five years of experience advancing the specified objective and success in Philadelphia or other relevant cities or regions.	More than five years of experience advancing the specified objective and an extensive track record of success in Philadelphia and/or Pennsylvania.
		Emergent, Developing, or Strong Required	
Community Knowledge and Engagement			
Absent	Emergent	Developing	Strong
No evidence of familiarity with the intended beneficiaries of the proposed project and no plan for future engagement.	Minimal evidence of familiarity with intended beneficiaries of the proposed project, but there is a commitment to develop a stakeholder engagement plan during implementation.	Evidence of familiarity with the intended beneficiaries of the proposed project 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 project and there is a plan for ongoing engagement during implementation.
		Developing or Strong Required	



### Additional expectations:

<b>Inclusive Programming</b>	Projects should ensure that programming is inclusive of all families including racial minorities, people with disabilities, and non-English speaking families.
<b>Accessibility</b>	For proposals that include direct services, planned services should take place in accessible locations, during convenient times, with consistently available language supports for non-English speaking individuals.
<b>Budget</b>	The requested budget is reasonable for the proposed activities and the stated results.

## Learning and Insights

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 through 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 optional informational webinar on **Tuesday, June 24, 2025 at 1:00PM 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 an 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.



# Application Process

**Before you apply**, please review the three questions below. If you can confidently answer “yes” to the questions, this funding opportunity may be relevant to you. If you respond “no” to any of the questions, this opportunity is not a good match for your project, and you should not apply.

	YES	NO
Are you seeking funding only to serve families who reside in Philadelphia?	<input type="checkbox"/>	<input type="checkbox"/>
Does your proposed project primarily serve families with children ages 0-8?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization have a successful track record of connecting families to public benefits and/ or tax credits?	<input type="checkbox"/>	<input type="checkbox"/>

Please also review all of the criteria on pages 6 and 7 and make sure that your program aligns with those.

If you answered “yes” to all of the questions above and meet the stated criteria, 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 ET on **July 25, 2025**. 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 Aly Tooher at [atoohier@williampennfoundation.org](mailto:atoohier@williampennfoundation.org).*

# Timeline

## June 18, 2025

Proposal submission period opens.

## June 24, 2025

Informational Webinar (see page 7)

## July 25, 2025

Proposals due by 5:00PM ET

## August 6-11, 2025

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 11-September 5, 2025

Site visits conducted by WPF staff with selected applicants.

## October 24, 2025

WPF Board review selected proposals.

## November 2025

Project implementation can begin.