Philadelphia Poverty Action Fund

Community Challenge #1: Family Stability

Call for Collaborations

November 2020

Call for Collaborations Contents

Key Dates

November 23, 2020: Call for Collaborations Released
November 30, 2020: Informational Webinar
Interested participants may register by using this link:
https://forms.gle/fuP5mgtEbN7edF596
December 18, 2020: Proposals Due
January 2021: Services Begin
January 2021 - January 2022: Grant Period

Section I

1. Background and History

In 2020, United Way of Greater Philadelphia and Southern New Jersey teamed up with the City of Philadelphia to introduce a new public/private partnership aimed at reducing poverty and promoting equitable recovery from the pandemic. Our collective strategy has been informed by partners such as Monitor Institute by Deloitte and Moody's Analytics and designed to build a community-informed, evidence-based strategy to address Philadelphia's high rates of poverty. In early 2020, City Council released the Poverty Action Plan, detailing an aligned set of interventions to reduce Philadelphia's poverty rate. This spring, United Way led a community-informed process that inspired a citywide initiative to inform and adapt the model. In October, City Council introduced legislation for the Poverty Action Fund to collaboratively invest in effective interventions and intensive measurement and learning.

2. The Poverty Action Fund Overview

The Poverty Action Fund is a joint effort between United Way, the City of Philadelphia and private philanthropy to reduce Philadelphia's poverty rate and create opportunities for an equitable recovery from the economic collapse. Through this initiative, a public/private fund has been developed to streamline evidence-focused grantmaking processes and support high-performing community organizations and partnerships. The Poverty Action Fund is administered at United Way, with a separate governing board, three content-specific advisory groups, and independent staff to provide guidance and direction throughout the grant process.

The Poverty Action Fund has three primary components:

- A citywide awareness-building strategy to ensure all residents of our region can engage in the fight against poverty and strive collaboratively for an equitable recovery
- A community investment process anchored by a series of *Challenges*, designed to invest deeply in place-based and population-based collaborations to maximize opportunity, income, and stability for families facing poverty
- A Knowledge Nerve Center to support data collection, evaluation, learning, and transparent reporting on outcomes and to ensure continuous improvement and adaptation

Through the Poverty Action Fund, the United Way is releasing its first Community Challenge centered on **family stability.** We are inviting organizations with diverse expertise and deep community reach to partner on place-based and/or population-based strategies to connect a maximum number of individuals and families with a comprehensive set of public benefits, subsidies, supports, and resources for which they are eligible.

3. Community Challenge Purpose and Expectations

Never has it been more important for Philadelphians to maximize the social safety net, and draw down the full range of income supports, housing/utility subsidies, food and nutrition assistance, childcare, healthcare, and other assistance available to help navigate the economic crisis facing our city and country. Research shows that by offering opportunities to enroll in multiple benefits, alongside services such as financial counseling, legal support, free tax preparation, and employment services, residents increase their income, reduce expenses and more quickly reach stability.[1]

Recognizing that economic security programs and a strong safety net are effective tools for combating poverty, this Community Challenge seeks to support collaborations rooted in improving access and connections to benefits, tax credits, supports, and other local, state, and federal financial resources to lift the earning power of Philadelphia's low-income residents. Access to these need-based government benefits and financial instruments have been shown to have an impact on poverty rates. For example, according to the federal government's Supplemental Poverty Measure (SPM), the poverty rate has fallen from roughly 26 percent in 1967 to 14.4 percent in 2017, largely due to the growing effectiveness of economic security programs such as Social Security, food assistance programs and tax credits for working families. During the same period, the poverty rate among children was cut from 24.9 percent to 14.8 percent. This resulted in the lifting of nearly 37 million people above the poverty line, including more than 7 million children.[2]

Through the Family Stability Community Challenge, we will identify high-performing nonprofit organizations and partnerships proposing collaborations that connect individuals and families to important economic security programs and public benefits that can help lift them out of poverty and help ensure an equitable economic recovery in Philadelphia. Specifically, we hope to identify partnerships that:

- Create and make available free tax preparation and benefits screening and application tools that streamline enrollment and access
- Convene and bring together a broad range of diverse programs that help connect low-income Philadelphians to subsidized basic needs, such as food, health care, housing and child care, and provide added income, such as the Earned Income Tax Credit (EITC), Supplemental Security Income (SSI), and direct cash transfer

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[1] Eric Burnstein, Megan Gallagher, and Wilton Oliver, "Economic Mobility Services for Affordable Housing Residents Exploring Resident Services as a Vehicle for Economic Success" (The Urban Institute, January 2019), https://www.urban.org/sites/default/files/publication/99640/economic_mobility_services_for_affordable_housing_residents.exploring_resident_services_as_a_vehicle_for_economic_success.pdf.

[2] Danilo Trisi and Matt Saenz, "Economic Security Programs Cut Poverty Nearly in Half Over Last 50 Years," Center on Budget and Policy Priorities, September 14, 2018, https://www.cbpp.org/research/poverty-and-inequality/economic-security-programs-cut-poverty-nearly-in-half-over-last-50

- Improve outreach and address accessibility-related barriers through the use of nontraditional venues, such as community-based organizations, community colleges, public schools, and child care centers

Organizations and partnerships responding to the Family Stability Challenge are required to discuss how their proposed initiative takes a ***place-based and/or population-based*** approach to poverty reduction.

An example of a place-based approach would include a focus on a certain neighborhood or zip code where the applicant has unique expertise, trust and ability to reach families who would benefit from services.

An example of a population-based approach would be a focus on a targeted citywide distribution network where the applicant has unique access and trust, including schools/community colleges/daycare centers, healthcare, senior centers, or other convening places where a high volume of eligible Philadelphians might access services.

We expect proposals to leverage organizational partnerships that strengthen awareness building and community outreach, provide place-based or population-based expertise, and expand access to programs and services that support stability among low-income households, including but not limited to tax preparation, benefits access, financial/legal counseling, and other income and basic needs supplements (see ***Appendix A*** for sample list). In order to successfully deliver these services, we expect organizations will develop collaborations that leverage the expertise of multiple partners (see ***Appendix B*** for a sample collaboration).

The Poverty Action Fund intends to award grants to support activities described in this call for collaborations. **Grants of $1,000,000 - $2,500,000 will be for a one-year engagement,** beginning January, 1, 2021. Additional support will be provided to grantees and their partners to promote measurement and evaluation efforts, including data collection and client follow-up. While these are one year grants, we anticipate making future funding available based on public and private allocations and grantee performance. Grantees will be expected to deliver services between January 2021 and January 2022.

Through the Family Stability Community Challenge, grantees will be expected to:

- Set targets for families served, financial and non-financial resources provided, and total value of supports and services
- Demonstrate experience and capacity for robust data collection and participate in an overall evaluation of the grant program, including but not limited to:
    - Short-term and long-term analysis of outcomes data
    - Qualitative surveys and interviews of leadership and frontline staff and collaborators, as well as potential focus groups with individuals served
    - Assessment of the nature of partner collaborations and any changes made to improve service delivery, increase organizational efficiencies, and/or introduce innovative program elements

    - *Please note: Technical assistance and evaluation will be supported through separate funding focused on building and sustaining data collection and assessment systems*
- Collaborate with partner organizations on a comprehensive outreach strategy that emphasizes service delivery and support to communities that have historically lacked access to economic security programs and other services outlined in the proposal
- Designate a lead organization to coordinate partners, lead grant management, and report on outcomes
- Designate a lead staff member to serve as the coordinator, who will oversee program components including the design, implementation, and reporting of the project
- Provide monthly web-based reports of outreach and participation figures across full range of services and benefits
- Submit programmatic and financial reports in a timely manner
- Participate in regular conference calls and web surveys and share information and “lessons learned” with fellow grantees and staff

4. Data Collection Resources and Expectations

Data collection and program evaluation are critical components of the Family Stability Community Challenge. The Poverty Action Fund, along with our evaluation partners, intends to support grantees in designing and implementing robust data collection and measurement systems to ensure effective program delivery and success over the lifetime of the grant. Recognizing the significant investment of time and resources involved in managing evaluation efforts, the Poverty Action Fund will work with grantees to provide support and technical assistance to develop strong, comprehensive measurement systems that accurately assess impact and track progress against clearly defined goals and metrics.

To ensure the successful development and execution of a robust evaluation plan, we seek to work with grantees to ensure clearly defined data collection and assessment parameters that focus on the measurement of short- and long-term outcomes. Grantees will be expected, along with their collaborative partners, to track client output data and follow up with individuals to monitor their outcomes over time. Expectations related to data collection and measurement activities include:

- Developing and facilitating qualitative surveys and interviews with frontline staff, partner and stakeholder leadership, and individuals served across the partnership network
- Assessing partnership collaborations and any changes made to improve organizational effectiveness and service delivery
- (Short-term Outcomes) Developing, reviewing, and monitoring implementation metrics (e.g. number of individuals screened, benefit applications submitted, etc.) and performance metrics (confirmed receipt of benefits, dollar value of newly generated income, etc.) that are crucial for course correction and continuous improvement

- (Long-term Outcomes) Conducting a longitudinal evaluation beyond the 1-year grant that tracks longer-term outcomes expected as a result of the shorter-term gains on benefits

The Poverty Action Fund is committed to:

- Providing funding, administrative support, and other resources to ensure grantees have the training and technical assistance needed to oversee longitudinal data collection and measurement efforts
- Partnering with a research/academic institutional partner to work directly with grantees, supporting them through the design, implementation, and growth of evaluation systems
- Continuous improvement, adaptation, and learning. This Community Challenge places a strong emphasis on data collection and outcome measurement as important tools for understanding program impact and improving client outcomes
- Informing broader philanthropy and local policy development on effective strategies for reducing poverty among vulnerable communities. The Poverty Action Fund will collaborate with leaders from government, nonprofits, and the business community to identify and scale best practices for improving economic opportunity and access to financial resources for low-income and economically disadvantaged Philadelphia residents

5. Process and Timeline

Proposals are due by ***December 18, 2020***. Candidates will be identified for further review and interviewed through the end of December 2020.

Respondents will be required to identify strategic partners (maximum of 7) to support the effort and increase the services provided and outcomes achieved. Strategic partners may include nonprofit organizations, for-profit companies, other community-based organizations. Partners may be written into multiple proposals with different lead organizations. Applicants are required to submit letters of commitment from each partner.

Proposals should clearly identify the lead agency responsible for bringing together the network of partners, managing the grant, ensuring compliance, and liaising with the Poverty Action Fund.

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6. Eligibility and Requirements

To be eligible to apply, partnerships must have these core elements in place:

- Must serve low-income communities and the mission must align with advancing individuals and families economically
- Ability to offer free tax preparation services at significant scale
- Ability to screen for, assess, and confirm receipt of a wide range of local, state, and federal benefits (see Appendix A for sample list)
- Demonstrated success in convening partners and bundling resource to maximize outcomes and increase access for community members
- Ability to track and report outcomes, including total financial and non-financial resources accessed, and participate in comprehensive evaluation
- Must be able to implement and operate the program between January 2021 and January 2022
- Lead applicant must have had an independent audit of their finances within the last two years
- Lead applicant must be a non profit or educational institution with IRS code Section 501(c) (3) and 509(a) (1), (2) or (3), or Section 170(c); or a public entity

Special consideration and priority will be given to applicants that exhibit the following characteristics:

- An organizational commitment to diversity, multiculturalism, and inclusion that is clearly reflected across all administrative and programmatic aspects of the service model
- Deep community reach, access, and trust in a defined geographic area or among a defined population which is challenged with high rates of poverty and unemployment
- Experience working with evaluation partners and conducting rigorous assessments
- Thoughtful integration of the following offerings/services:
    - Financial counseling and coaching
    - Direct cash transfer
    - Housing subsidies and/or rental support
    - Food and basic needs referrals
- A well-constructed and vetted plan for delivering services during the COVID-19 pandemic while ensuring the health and safety of clients and program staff

Section II

1. Proposal Guidelines

In order to be considered complete, applications must include a detailed written narrative, a completed projected outputs table, a detailed budget, and all requested attachments.

Written Narrative

Background Information/ Basic Overview	a. Lead Organization Name b. Executive Leadership c. Project Director d. Street Address, City/State /Zip e. Telephone f. E-mail g. Website h. Social Media Presence (Facebook, Twitter, and/or LinkedIn) i. Total agency budget for last fiscal year
Organization Overview (500 word limit)	a. Mission statement b. Brief overview of lead organization including current programs and services c. Partnership structure for the Challenge proposal
Statement of Need (500 word limit)	a. Why is access to economic security programs necessary in your target area/population? In your answer, please describe the current system used to connect community members in your proposed target audience to public benefits and other economic security programs b. What unique impact can your proposed project make to improve access to benefits in your proposed target area?
Target area and populations (500 word limit)	a. Identify the specific geographic area(s) within Philadelphia that your proposed project will serve and include specific zip code(s) that you intend to target. b. Identify your strategy, channels, and partnerships to engage participants, your target population, as well as any specific hard-to-reach populations (e.g., those with limited English proficiency (LEP), returning citizens, veterans)

Evaluation capacity (500 word limit)	a. Describe your organization’s current data collection infrastructure and practices (i.e. does your organization have a MIS?) b. When assessing impact, what are your key measures of success? c. Describe your proposed approach to data collection and sharing across partner organizations (i.e. will data be collected centrally by the lead organization or across various partners?)
Planned objectives (250 words + table)	a. Please complete the included table to project outcomes (see “TABLE: Expected Outcomes” below), including: i. How many total individuals will your agency assist with screenings and applications for benefits? ii. Please estimate the projected financial drawdown resulting from benefit screening and enrollment b. Please describe your methodology for this calculation, including previous outcomes and how many new individuals and families you expect to reach.
Description of Approach and Activities (1500 word limit)	a. Describe the approach your proposed project will use to find, reach out to, engage, and enroll individuals eligible for services. b. Identify your partner organizations and indicate the specific roles that each partner will play. Specific roles should be reflected in the letters of commitment from partner organizations. c. Describe your planned activities during the grant period and how you plan to implement, including timeline and lead partner for each. d. Describe your organization’s experience providing tax preparation services and screening/enrolling clients in benefits and, if applicable, working with benefit-administering agencies. If you don’t currently assist applicants with accessing benefits, please describe your plan to integrate it into your work. e. Describe how you will track your agency’s work. What case management tools do you currently use to track clients? f. What screening tools will you use in the program and why? g. Describe what additional financial and in-kind resources you will leverage toward the grant activities. h. What safety precautions or measures do you intend to have in place to ensure that proper health guidance is being met to protect people during the COVID-19 pandemic?
Management & Organizational Capacity (1000 word limit)	a. Identify the project lead, describe relevant experience, and identify time commitment to this project. b. Identify other key staff, relevant experience, and time commitment. c. If applicable, discuss how volunteers will be utilized, recruited, trained, and managed.

	d. Explain how this project fits with your organization's mission and other programs. e. Share experience managing large grants. f. Describe your organization's commitment to diversity, equity, and inclusion (DEI). How are DEI goals developed and who is responsible for making sure these goals are met?

TABLE: Projected Outputs* (please find an editable version on the website)

**Please only list net new outcomes expected as a result of this project*
***Including actual cash drawn down and projected value of services*

Service	**Total Individuals Applied**	**Total Cash Value to Clients ($)**	**Estimated Value of Services Provided ($)****
Tax Preparation (incl EITC, CTC, Property Tax Credits, PTRR, etc.)			
Health Insurance Access			
SNAP			
Low-Income Home Energy Assistance (LIHEAP)			
Supplemental Security Income (SSI)			
Public Assistance (TANF, TTANF, BIA General Assistance)			
Free Application for Federal Student Aid (FAFSA)			
Utility assistance (Gas, Electric, Water, and Senior Low-Income Programs)			
Veteran's benefits (e.g., pensions, VA medical care)			
Housing subsidies (e.g., public housing, Section 8, rental subsidies)			
Unemployment insurance			
Subsidized transit benefits			
Other home benefits (e.g.,Weatherization, Section 504 Home Repair)			
Other food benefits (e.g., WIC, TEFAP, CSFP, FDPIR)			
Direct Cash Transfer			
Other			
Other			
Total			

Milestones and Goals

Grantees will be required to provide regular reports of outreach and enrollment figures, including numbers of people applied and enrolled in benefits and participating in services. The monthly reports will be required over the full duration of this grant. The grantee will also be required to submit narrative and financial reports. Please see Appendix C for a list of potential evaluation metrics (in development).

Budget

Please provide a comprehensive budget and relevant narrative using the budget template included in this proposal, including separate tabs for the lead applicant and each partner organization. If additional revenue is being leveraged to help fund your efforts in this project, please be sure to include a brief narrative describing the vision for accessing and utilizing additional funding.

Required Attachments

- Written proposal narrative
- Completed budget template
- Completed projected outputs table
- Copy of lead applicant's 501(c)(3) determination letter for nonprofit educational institution's determination letter with IRS code Section 501(c)(3) and 509(a)(1), (2) or (3), or Section 170(c)
- Copy of most recent audit (within past two years)
- Previous evaluations and outcomes reporting from previous years (if available)
- List of current board members and affiliations
- Biographies of Key Personnel
- Letters of commitments from partners

2. Selection Criteria

The following criteria will be used to identify high-performing partnerships and inform grantmaking decisions.

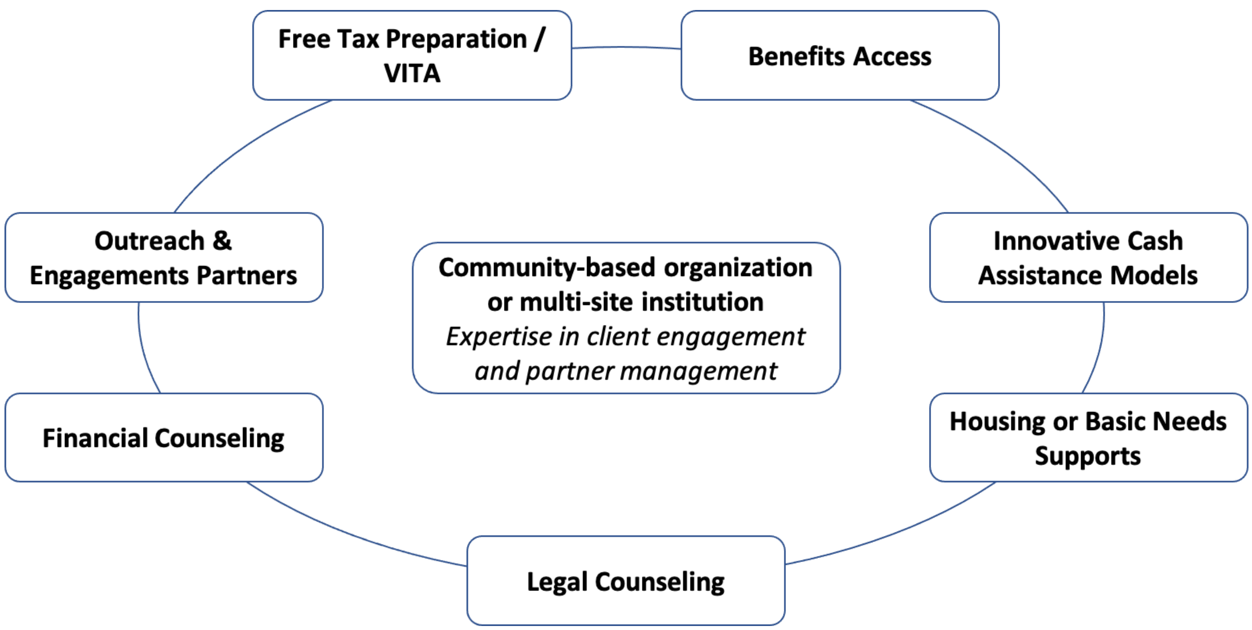
- Statement of need [5 points]
  - Does the applicant clearly articulate a demonstrated need among the population to be reached?
- Target area and populations [20 points]
  - Is the applicant focused on a high-needs, high-opportunity target region or population?
  - Do the applicant and its partners have the capacity to reach and engage a high volume of participants among their target group?
- Planned objectives [10 points]
  - Does the applicant lay out an ambitious plan to reach and maximize resources to families?
  - Does the applicant set reachable goals, given the investment and timeline?
- Description of approach and activities [40 points]
  - Does the partnership include diverse expertise to adequately address the multiple deliverables of the project?
  - Do the timeline and planned activities adequately address the stated objectives?
  - Do the partners have a clear plan to integrate services and maximize value?
  - Does the partnership have capacity to collect data and measure impact?
  - Does the partnership provide a strong return on investment, based on the service and benefits provided?
- Management and organizational capacity [15 points]
  - Is the team equipped to undertake substantial growth and fast-paced implementation?
  - Is the organization financially stable and able to manage a large infusion of capital?
  - Is there organizational experience with robust, long-term data collection?
  - Is there organizational experience working with third party evaluators to conduct impact assessments?
- Budget and Budget Narrative [10 points]
  - Do the partners describe a clear and logical plan for allocating resources?

Appendix A. List of Potential Benefits (non-exhaustive)

- Health Insurance Programs
  - Medicaid
  - Medicare Savings Program (MSP)
  - Children's Health Insurance Program (CHIP)
  - Qualified Health Plan (QHP)
  - Part D Low-Income Subsidy (LIS)
  - Prescription benefits other than Part D (e.g., PACE/NET, SPAPs)
- Supplemental Nutrition Assistance Program (SNAP/Food Stamps)
- Low-Income Home Energy Assistance (LIHEAP)
- Supplemental Security Income (SSI)
- Social Security Disability insurance (SSDI)
- Temporary Assistance for Needy Families (TANF)
- Free Application for Federal Student Aid (FAFSA)
- Tax Filing Assistance
  - Earned Income Tax Credit (EITC)
  - Child Care Tax Credit (CTC)
  - City Property Taxes (Homestead Exemption, LOOP, Senior Tax Freeze)
  - State Property Tax/Rent Rebate (PTRR)
- City utility assistance (Gas, Electric, Water, and Senior Low-Income Programs)
- Veteran's benefits (e.g., pensions, VA medical care)
- Housing subsidies (e.g., public housing, Section 8, rental subsidies)
- Public assistance (TANF, TTANF, BIA General Assistance)
- Unemployment insurance
- Subsidized transit benefits
- Other home benefits (e.g.,Weatherization, Section 504 Home Repair)
- Other food benefits (e.g., WIC, TEFAP, CSFP, FDPIR)
- Other (open response)

Appendix B. Example Partnership Model

There are many ways that partnerships can be structured to maximize resources for families, but research has shown that collaborative service delivery between multiple experts, including a trusted lead organization to engage eligible participants and coordinate partners, are effective ways to maximize resources and supports. With the goal of reaching communities who have not previously accessed these services, consider how a diverse range of outreach partners can help increase families' access and ability to draw down public resources that they are eligible for. Such a partnership might include the following constellation of partners and services:



Multiple services may be delivered by each partner, but all services should be delivered by organizations with a demonstrated track record of success and capacity to scale their work.

Appendix C. Long-term Goals and Milestones (in development)

The Poverty Action Fund is working with evaluation partners to develop longitudinal evaluation parameters. Grantees will be expected to participate in data collection and measurement and a long-term evaluation. Evaluation may include longitudinal analysis of:

- # of individuals who increased their Monthly Net Income
- # of individuals who increased their Net Worth
- # of individuals who exited poverty
- # of individuals who secured employment
- # of individuals who secured education opportunities

Other metrics and milestones to track include:

- # of individuals screened for benefits eligibility
- # of individuals determined to be potentially eligible for at least one benefit during screening
- # of individuals for whom at least one application or renewal for any benefit was submitted to an administering agency
- # of individuals receiving two or more benefits
- Average number of benefits/services received by each participant
- # of applications, renewals, and confirmed receipt of benefits
- Dollar value of benefits received by benefits
- Dollar value of services provided (counseling, legal, etc.)

Please note: the list of metrics and milestones included in this Call for Collaborations is not meant to be exhaustive. We are continually exploring new metrics and success indicators to measure and track the impact of services on communities.