



## Request for Proposals: *Education First* 2019 Guidelines and Application

### Background

WECU is deeply committed to its mission: *making a meaningful difference in the lives of our members*. From when we first opened our doors in 1936 as Bellingham Teachers' Credit Union, we have strived to serve others and do what's right.

WECU is tremendously excited to reach the communities of Whatcom County in new ways and create meaningful partnerships, a core principle since our founding.

### Our Commitment

#### Education First

Starting as a cooperative founded by teachers, our commitment to education and our partnerships with educational institutions has remained a consistent presence in our outreach.

**Education First is WECU's initiative to support programs furthering the academic achievement of students, in partnership with pre-k, K-12, community colleges, technical colleges, universities and libraries. In addition, WECU also seeks to support financial education with various agencies serving residents of all ages throughout the community.**

### Our Approach

For 2019, WECU has committed charitable funds to support select causes that will further the academic success for Whatcom residents across the county.

Applicants may seek program or general operating support for a minimum award of \$20,000 and a maximum award of \$40,000 for *two-year* grant terms. Funding eligibility and criteria are provided further below.

- ❖ **Program support** – aimed to support a specific project or activity led by the applicant organization, and tied to a specific, project-based outcome.
- ❖ **General operating support** – aimed to support an organization's overall activities, which may include general operating expenses. Consideration given to applicants with demonstrated track record and indicators of strong organizational capacity, leadership and sustainability.

### RFP Key Dates & Requirements

**PURPOSE:** To provide greater quality educational experiences for Whatcom students from early learners to adult learners.

**ELIGIBILITY:** WECU seeks to support programs serving Whatcom County in partnership with pre-k, K-12, community colleges, technical colleges, universities and libraries which further the academic achievement of students. In addition, WECU also seeks to support financial education with various agencies serving residents of all ages throughout the community. Eligible applicants must also demonstrate tax exempt status 501c3 or 170(b)(1), other government entities and/or tribes.

**TOTAL AMOUNT AVAILABLE:** \$55,000 for two-year terms

**GRANT AWARD RANGES:**  
\$20,000 - 40,000 total for two-year term (Eg: \$15,000 year one, \$15,000 year two)

**GRANT TERM:** Two-year term

**2019 SUBMISSION DEADLINES:** March 31, 2019

**AWARD NOTIFICATION:** July 2019

**QUESTIONS AND SUBMISSIONS SENT TO**  
**GRP.COMMUNITYIMPACT@WECU.COM**

In an effort to spread WECU charitable investments to address the increasing needs in our communities, grants to recipients will not be renewed after the two-year term to provide new applicants with this funding opportunity. Should you or your organization decide to submit a proposal in 2019, please keep in mind that WECU **Education First grant recipients will be asked to take a two-year hiatus (one full grant term) before re-applying for Education First funding.** This allows WECU the opportunity to support many promising opportunities and furthers our value that nonprofits sustain their operations through diverse funding sources.

This RFP invites proposals that can make significant changes in the educational experiences for individuals in our communities. Some examples include:

- Program development: To pilot parent and teacher's workshops on the prevention, recognition and responsible reaction to child sexual abuse. Thus, positioning students to be psychologically and emotionally ready to learn.
- Capacity building: Grants to organizations for staff support, training, and strategic or long-range planning. For example, training finance professionals how to teach everyday budgeting and financial literacy to high school students.
- Collaborative efforts: Partnering with other organizations (e.g. school-based nonprofit, PTA, library) to host monthly programs that promote family engagement centered on education and learning.

**Note:** WECU continues its commitment to support a broad range of community issues and for those interested in learning more about our small grants program and volunteer support, please refer to WECU's [Corporate Giving](#) page for additional information.

## Eligibility

- Organizations, school districts and postsecondary education institutions with tax exempt status 501c3 or 170(b)(1), other government entities and/or tribes.
- Organizations serving Whatcom County.
- WECU receives a large volume of requests over the course of the year and therefore we are regrettably unable to support every worthwhile request. We are unable to award funds to certain sub-categories including, but not limited to: *requests for individuals, travel expenses, trips or tours, pledges, sectarian or religious purposes, political lobbying/campaigns, capital building for foundations, and scholarship funds (other than through our WECU Scholarship programs).* WECU will not consider requests from organizations or events which could create controversy or friction among the general membership.
- WECU typically does not award funds to organizations that have already received funding during the current calendar year.
- Applicant agrees that it does not unlawfully discriminate in its employment practices, volunteer opportunities, or the delivery of programs or services, on the basis of race, color, religion, gender, gender identity/expression, national origin, ancestry, age, medical condition, disability, veteran status, marital status, sexual orientation, or any other characteristic protected by law.
- WECU Advisory Panel members that serve on boards or work as staff for an applying organization will recuse themselves from related funding decisions.

## Timeline

### 2019 Two-year grants

- |                                    |                                     |
|------------------------------------|-------------------------------------|
| ○ January 1, 2019 – March 31, 2019 | Request for proposals               |
| ○ April 1, 2019 – June 30, 2019    | WECU Advisory Panel review          |
| ○ Early July 2019                  | Notification of grant selection     |
| ○ July 2019                        | First installment grant payment     |
| ○ June 2020                        | Grantees share progress on year one |
| ○ July 2020                        | Second installment grant payment    |
| ○ July 2021                        | Grant Summary Report                |

## Decision and Notification Process

An advisory panel of three to five members will actively participate in the review of the proposals April through June. The first screen will rank proposals based on alignment with WECU grant guidelines, viability, and need addressed. A subset of applicants will advance to the next round of review which includes an opportunity for the advisory panel to meet in person with applicant organizations on site or some other agreed upon location.

Ultimately, funding decisions will be based upon the degree to which the proposal meets the details outlined in the proposal narrative (page 6) and the review criteria (page 7).

### ***Expectations of Education First Grant Recipients***

- Recognition-- You agree that WECU may disclose information about the project and organization and use the name and logo of the grantee in WECU public communications (including press releases), advertising and marketing materials, reports, website and other materials, for promotional or other purposes without further permission or compensation. Upon request by WECU, you agree to provide reasonable assistance to WECU to obtain signed publicity waivers from your employees, students, volunteers, and other persons associated with grantee (for example, for use of photos or video taken by WECU in connection with the grant or your project).
- Share learning and program highlights with WECU and the community (e.g. reporting, site visits, events).
- Recipients can expect grant awards to be paid in two installments: at time of award and after year one (contingent on satisfactory progress on funded project).

## Proposal Application Cover Page

### Organization Information

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*In preparing a proposal to WECU, please include the following organization information in the first page of your proposal or within a separate cover page:*

1. Organization Legal Name: EIN:
2. Organization Director Name, Title, Phone:
3. Contact Person (if different): Phone:
4. Contact Email Address:
5. Physical Address:

### Proposal Information

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6. Request Amount: \$ \_\_\_\_\_ (min \$20,000 - \$40,000 max total)
7. Organization budget: \$ \_\_\_\_\_ for fiscal year ended: \_\_\_\_\_
8. Request Need:  **Program Support**  **General Operating Support** (not specific to any one program or targeted service)
  - A. For Program Support Requests, name of program: \_\_\_\_\_
9. Please attach each of the items below as separate PDF documents:
  - Proposal: Cover page, proposal narrative and for **program support requests**, include program budget
  - Current board list and affiliations
  - Current fiscal year organization operating budget and/or project budget
  - Prior fiscal year operating budget, for **general operating support request**
  - Most Recently Filed Form 990
  - Audited financial statements (if available)

## Proposal Narrative

In preparing a project proposal, please provide a narrative summary answering the following questions. Proposal format should not exceed four pages, single-spaced in 11pt font. Note that information requested for program support differs from information requested for general operating support.

### Program Support

- 1) **Alignment to Education First:** Briefly explain how this project addresses the *WECU Education First* initiative.
- 2) **Need Statement and Proposed Response:** What is the problem or issue you are trying to solve or address? Who is the population that you hope to impact or serve? Is there a disparate need? Please document and cite relevant and up-to-date demographic or research sources, if available, with a preference for local data. Briefly describe your proposed response to the expressed need and the process for shaping this request, in terms of partners or community members with whom you've consulted.
- 3) **Organizational Capacity:** What is your agency's history of effective service delivery to the community? What key staff and volunteers are in place? Will additional staff be required to carry out the project? In service delivery, who are your community partners?
- 4) **Budget and Sustainability:** Please provide a program budget for each year of funds requested showing a column for the total project cost and another column for the amount requested from WECU for each major cost category. Expected one-time costs (e.g. start-up/infrastructure-related) should be listed separately from on-going project-related costs. What are your agencies key funding sources? What is your strategy for sustaining the project after the funding term has ended (note: grantees are asked to wait two years before re-applying for *Education First* funds)?

Expense Categories (examples below)	Year 1 Budget Sources			Year 2 Budget Sources		
	Applicant Contribution to Program Budget Year 1 (A)	WECU Contribution Year 1 (B)	Total Year 1 (A+B)	Applicant Contribution to Program Budget Year 2 (A)	WECU Contribution Year 2 (B)	Total Year 2 (A+B)
Salaries						
Training						

- 5) **Implementation Plan and Milestones:** Provide a high-level outline of your project plan and timeline, including any necessary planning, key activities, critical goals to meet throughout the grant term, and planning beyond the grant term. What are the anticipated challenges or inherent risks with this project? What are key service strategies and methods?
- 6) **Evaluation/Learning:** WECU values both qualitative and quantitative data and recognizes the challenges in demonstrating a correlation between funding and project success. Please describe, in your own words, how you will measure the success of this project, learn from its challenges, and share results broadly.

### General Operating Support:

- 1) **Alignment to Education First:** Briefly explain how your organization addresses the *WECU Education First* initiative.
- 2) **Need Statement and Proposed Response:** What is the problem or issue you are trying to solve or address? Who is the population that you hope to impact or serve? Is there a disparate need? Please document and cite relevant and up-to-date demographic or research sources, if available, with a preference

for local data. Briefly describe your proposed response to the expressed need and the process for shaping this request, in terms of partners or community members with whom you've consulted.

- 3) **Organizational Capacity:** What is your agency's history of effective service delivery to the community? What key staff and volunteers are in place? Please describe the level of relevant experience of organizational leadership, both staff and board. Will additional staff be required to carry out the project? In service delivery who are your community partners?
- 4) **Budget and Sustainability:** Include organization budget the past two fiscal years. How will your organization best utilize a general operating support grant? Include a list of the top three ongoing funding sources contributing toward your organization's mission.
- 5) **Implementation Plan, and Milestones:** Provide a high-level outline of your activities and timelines, including mission, vision, strategic initiatives and critical organization goals to meet throughout the grant term, and planning beyond the grant term. What are the anticipated challenges or inherent risks? What are key service strategies and methods?
- 6) **Evaluation/Learning:** WECU values both qualitative and quantitative data and recognizes the challenges in demonstrating a correlation between funding and project success. Please describe, in your own words, how you will measure organizational success, learn from challenges, and share results broadly. Additionally, name two areas *within* your organization or *served by* your organization that are a focus of continuous improvement.

## Review Criteria

This table generally follows the order of the sections of the application and is applicable to program support and general operating support in the relevant areas requested:

Area	Indicator
<b>Alignment to <i>Education First</i></b>	Alignment to <i>Education First</i> focus to further the academic achievement of students or address the financial literacy needs of individuals. Clear articulation of how proposed activities will contribute to student success or increase financial literacy among community participants.
<b>Need and Proposed Response</b>	<ul style="list-style-type: none"> <li>• Presents a compelling need in the community, addresses disparities and is substantiated (where possible) using most recent demographic and usage data. Utilization of local data sources is preferred.</li> <li>• Commitment to engaging community stakeholders (clients, beneficiaries, and partners) in understanding the need and shaping the proposal.</li> <li>• Demonstrated effort to consult relevant service agencies to develop best practices and shared learning.</li> </ul>
<b>Organizational Capacity</b>	<ul style="list-style-type: none"> <li>• Agency's history of effective service delivery to the community (including quantifiable outcomes, where available).</li> <li>• Appropriate amount of qualified staff and/or appropriate amount of qualified volunteers to lead, implement, and evaluate proposed activities.</li> <li>• Demonstrated effort(s) to collaborate with partners or agencies.</li> </ul>
<b>Budget and Sustainability</b>	<ul style="list-style-type: none"> <li>• Budget information should be complete and accurate.</li> <li>• Budget estimates should be reasonable and aligned to support proposal activities, objectives, and timeline.</li> <li>• Additional funding sources (financial and in-kind) for proposed program and services should be identified, where applicable.</li> <li>• Ultimately, proposed budget should demonstrate efficient use of WECU resources.</li> <li>• Articulation of plan to secure resources that support the organization and/or program beyond the life of the grant term.</li> </ul>
<b>Implementation Plan and Milestones</b>	<p>Proposal should include:</p> <ul style="list-style-type: none"> <li>• Clear outline of activities and realistic timeline with relevant and achievable outcomes.</li> <li>• Understanding of possible risks and/or challenges.</li> <li>• Strategies and methodologies applied using sound reasoning.</li> <li>• Performance measurements and other means of assessment are clear.</li> </ul>
<b>Evaluation/Learning</b>	<ul style="list-style-type: none"> <li>• Evaluation plan articulates capacity/resources to assess impact and outputs.</li> <li>• Supplemental qualitative or anecdotal outcomes are encouraged.</li> <li>• Proposal should briefly describe how the organization and/or program is continually learning from and improving its services.</li> </ul>