request for proposals

Join Us in Advancing Financial Stability by Increasing Access to Financial and Tax Preparation Services
Introduction

Silicon Valley Community Foundation (SVCF) addresses our community's most challenging problems. Despite the area's great wealth, residents are challenged by so much – lack of affordable housing, financial instability, the precarious safety and insecurity of immigrants and persistent gaps in student achievement. Through its discretionary grantmaking, the community foundation addresses these and other issues including support for people to engage in civic affairs and the public decisions that directly affect their lives.

SVCF recognizes that to achieve meaningful progress on these issues, collaboration is critical. By issuing requests for proposals (RFP), we hope to solicit the best ideas from nonprofits, public agencies, research institutions and community organizations serving San Mateo and Santa Clara counties, and to partner together on solutions. The focus of this RFP is on advancing financial stability by increasing access to financial and tax preparation services. We invite you to apply.

Grant Application Deadline

Grant applications must be submitted through our online application system, Apply SVCF, by 11:59 p.m. (PST) on July 19, 2019.

The Problem

Despite our region’s rapid growth and low unemployment, economic security in Silicon Valley has grown more precarious for many. When housing costs are taken into account, nearly one in five residents in Silicon Valley is living in poverty and coping with significant economic hardship.1 Meanwhile, low-income households have seen the slowest recovery to their incomes since the Great Recession.

The Opportunity

Given this economic reality, it is more important than ever to boost income for low-income households. Tax credits for the working poor, such as the Earned Income Tax Credit (EITC), child credit and child care credit, lift more families out of poverty than any other effort. The EITC has lifted 1.3 million California households out of poverty each year between 2015 and 2017.2

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The tax filing season provides an opportunity to engage local families on financial stability issues, from investing a portion of their refund to signing up for financial education courses.

Far too many families miss out on this support, leaving behind an estimated $65 billion in government services and support that goes unclaimed. Burdensome application criteria and processes mean far fewer people apply than are eligible.

Innovative states across the country, as well as federal policymakers, are now shifting away from the traditional model of public benefits enrollment requiring face-to-face office visits during work hours, and exploring new methods to determine eligibility, including technology, service integration and data sharing.

**Program Goal**

SVCF believes we can help more low-income people achieve greater financial stability by helping them save on tax preparation costs and helping them claim all tax credits and deductions for which they are eligible. Our goal is to invest in strategies that will increase access to financial education and tax preparation services for tax year 2020. SVCF has chosen to focus this grant opportunity on the following:

1. **Improving outreach to vulnerable and hard-to-reach populations** through culturally and linguistically appropriate activities and use of nontraditional venues such as community-based organizations, community colleges, elementary schools, child care centers and retail stores.

2. **Streamlining and increasing enrollment in financial education and tax preparation programs** through innovative approaches and creative uses of technology.

To ensure that available resources are being maximized, SVCF may also consider investments in research to determine unidentified needs and best practices to meet those needs. Lastly, SVCF will consider investing in information campaigns with the goal of increasing participation in financial and tax preparation programs.

**Application Process**

1. **Review reference materials**, including SVCF’s research brief on Advancing Financial Stability by Increasing Access to Public Benefits. These may be found at siliconvalleycf.org/grants.

2. **Participate in an information session**. This is highly encouraged for those responding to this RFP. Because all grant applications are submitted online, these sessions provide an overview of SVCF’s online application system, Apply SVCF.

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Additionally, the information sessions will provide an opportunity for applicants to review the RFP in more depth and ask questions. **Register for an information session.**

3. **Submit grant application**, including required attachments, through our online application system, **Apply SVCF**, beginning June 17, 2019. **Applications must be submitted by 11:59 p.m. (PDT) Friday, July 19, 2019.** A guide to the online application system can be found here.

More specific questions about project eligibility, proposal process and evaluation can be addressed through phone calls and in-person meetings with the program officer, as time permits.

**Proposal Eligibility Criteria**

- Organizations must serve San Mateo and/or Santa Clara counties. Organizations headquartered outside the two-county region may apply but should demonstrate significant service to these areas or partner with a local organization that can.

- Organizations with a 501(c)(3) designation, those that have a fiscal sponsor with a 501(c)(3) designation, public agencies, collaborations of nonprofit and public agencies, or other entities that have a designated charitable purpose will be considered.

- Organizations must not discriminate based on race, color, national origin, citizenship status, creed, religion, religious affiliation, age, gender, marital status, sexual orientation, gender identity, disability, veteran status or any other protected status.

- Organizations with religious affiliations will be considered for funding only if the project for which they seek support addresses the needs of the wider community without regard to religious beliefs.

**Proposal Evaluation Criteria**

SVCF awards grants on a competitive basis. Successful proposals will need to meet the minimum eligibility criteria and provide a clear and compelling narrative about how the proposed project will advance SVCF’s program goals. Proposals will also be evaluated using the following criteria:

- Clarity of project description and strategies/activities to be implemented to reach desired outcomes

- Relevant and measurable outcomes and indicators of success

- Strategies that are based on well-tested models and can be scaled or expanded regionally, while maintaining local relevance

- Achievable timeline (12 months) that corresponds to the key activities
• Organizational capacity to implement project including: staffing, leadership, and operational and fiscal management
• Established track record of work related to proposed project or likelihood of success with a new project
• Ability to leverage financial, human and technical resources from other partners leading to greater impact
• Ability to contribute successes and lessons learned with the field

Awards
Up to $100,000 will be awarded to nonprofits providing financial and tax preparation services locally. Applicants should include a budget narrative that makes clear the necessity of the project’s specific line-items.

Please note that project proposal narratives may be posted publicly on our website to reflect our value of transparency and encourage learning among grantees, future applicants and the community at large.

Review and Selection Process
An advisory committee with issue expertise will help staff review all proposals recommended for funding to SVCF’s Board of Directors. Applicants may receive a site visit, telephone call and/or other type of communication from SVCF staff as part of the review process.

Applicants will be informed of grant decisions in September 2019.

Evaluation, Monitoring and Grantee Learning Activities
Grantees will be expected to meet SVCF’s reporting and evaluation requirements as well as be willing and available to talk with SVCF staff and donor advisors if requested. Grantees will also be asked to participate in periodic meetings to share information on project successes, challenges and lessons learned to further the overall program goals of this RFP.

Thank you very much for your interest in responding to this RFP and in joining us in increasing access to financial and tax preparation services. We look forward to reviewing your proposal.
About Silicon Valley Community Foundation

Silicon Valley Community Foundation advances innovative philanthropic solutions to challenging problems. We engage donors and corporations from Silicon Valley, across the country and around the globe to make our region and world better for all. Our passion for helping people and organizations achieve their philanthropic dreams has created a global philanthropic enterprise committed to the belief that possibilities start here. Learn more at www.siliconvalleycf.org.

More Information

If you have questions, please contact us at grants@siliconvalleycf.org or call 650.930.9885

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