

Request for Proposals: Education First

2024 Guidelines and Application



Background

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

WECU is excited to reach Whatcom and Skagit counties in new ways and create meaningful partnerships, a core principle since our founding.

Our Commitment

As a cooperative founded by teachers, our commitment to education and our partnerships with educational institutions has remained constant in our community outreach.

Education First is WECU's initiative to support programs that supplement the learning of students enrolled in local pre-Ks, K-12 schools, community colleges, technical colleges, universities, libraries, or organizations providing financial education.

Our Approach

For 2024, WECU has committed charitable funds to support and enhance the life-long learning of residents across Whatcom and Skagit counties.

Applicants may seek program or general operating support for a minimum award of \$20,000 and a maximum 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, including general operating expenses. Consideration is given to applicants with demonstrated track records and indicators of strong organizational capacity, leadership, and sustainability.

RFP Key Dates & Requirements

PURPOSE: To supplement quality educational experiences for Whatcom and Skagit students from early childhood to adult learners.

ELIGIBILITY: WECU seeks to support groups serving Whatcom and Skagit counties which identify as, or are in partnership with, pre-Ks, K-12 schools, community colleges, technical colleges, universities, libraries, or organizations providing financial education. Eligible applicants must also demonstrate tax exempt status 501c3 or 170(b)(1), other government entities and/or tribes.

TOTAL AMOUNT AVAILABLE: \$62,500 for two-year terms

GRANT AWARD RANGES:

\$20,000 - 40,000 total for two-year term (E.g.: \$15,000 year one, \$15,000 year two)

GRANT TERM: Two-year term

2024 RFP SUBMISSION DEADLINE:

March 31, 2024

AWARD NOTIFICATION: July 2024

QUESTIONS AND PROPOSAL

SUBMISSION: impact@wecu.com

To spread WECU charitable investments that 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 2024, please remember 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 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 to teach everyday budgeting and financial literacy to high school students.
- Collaborative efforts: Partnering with other organizations (e.g., school-based nonprofits, PTA, library) to host monthly programs that promote family engagement centered on education and learning.

If an applicant does not deliver direct educational programming as a Pre-K, K-12, community college, technical college, university, or library, memorandums of understanding between the nonprofit and an eligible institution must be attached at the time of proposal submission. Letters of support are acceptable if details of a future memorandum of understanding are included. A sample MOU is included on page 4. Submitted MOUs may vary in style and should indicate leadership approval, contact information for key staff, essential duties and responsibilities, timelines/schedules, etc.

Note: WECU continues its commitment to support various community issues. Those interested in learning more about our small grants program and volunteer support should visit wecu.com/community.

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 or Skagit 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 specific 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 that could create controversy or friction among the general membership.
- Applicant agrees that it does not unlawfully discriminate in its employment practices, volunteer opportunities, or the delivery of programs or services, based on 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 who serve on boards or work as staff for an applying organization will recuse themselves from related funding decisions.

Timeline

2024 Two-year grants

- | | |
|---------------------------------------|---|
| ○ January 1, 2024 – February 28, 2024 | Submit Letter of Intent |
| ○ January 17, 2024 – March 31, 2024 | Proposal Submissions |
| ○ April 1, 2024 – June 30, 2024 | WECU Advisory Panel Review |
| ○ July 2024 | Notification of selection |
| ○ August 2024 | First installment grant payment |
| ○ June 2025 | Grantees share progress on year one |
| ○ July 2025 | Second installment grant payment |
| ○ July 2025 | Grant Summary Report |

Decision and Notification Process

An advisory panel of three to six members will review the proposals from April through June. The first screen will rank proposals based on alignment with WECU grant guidelines, viability, and the need addressed. A subset of applicants will advance to the next round of review which includes an opportunity for the advisory panel to meet organization representatives at an in-person presentation. Presentations will occur at an agreed-upon location in late May or early June, depending on the number of proposals received. All dates and notifications will be communicated to the contact listed on the organization's cover sheet.

Ultimately, funding decisions will be based on the degree to which the proposal meets the details outlined in the proposal narrative (pages 6-7) and the review criteria (page 8).

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 the 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 the time of award and after year one (contingent on satisfactory progress of the funded project).

SAMPLE: Memorandum of Understanding between Nonprofit and School/Library

I. PARTIES

The purpose of the Memorandum of Understanding (MOU) is to establish a relationship between _____ (NONPROFIT) and _____ (SCHOOL/Library).

WHEREAS, the NONPROFIT's services or program described in this MOU will be provided to the SCHOOL, the students, or the parents; and

BOTH PARTIES HEREBY enter this MOU to enable NONPROFIT to provide said services/programming to SCHOOL.

II. NONPROFIT SERVICES

- Ensure high quality instructional core
- Develop student's social/health skills, and emotional/physical health
- Develop student's cognitive and academic skills
- Create equitable opportunities for learning
- Ensure, maintain, or support high quality and effective instruction
- Prepare students for success in college and careers
- Help ensure, create, and/or sustain safe, healthy, and supportive schools
- Help create full-service community schools in SCHOOL district
- Increase graduation rates
- Other: _____

III. Time Commitment/Schedule

Provide details regarding the amount of time NONPROFIT provides services to the SCHOOL/LIBRARY and when (e.g. number of hours per day/week, number of weeks/months, etc.). Both parties should agree to this schedule. Any resources provided by the SCHOOL/LIBRARY should be indicated as well.

IV. Space

Should specify location of services and any facility(s) donated for program purposes.

V. Communication

Include contact information for both NONPROFIT and SCHOOL/LIBRARY key staff (Name, title, address, phone number, email)

IN WITNESS THEREOF, the parties to this agreement have duly executed on the day month and year set forth below. This agreement will expire upon completion of services on MM/DD/YYYY.

By: _____ Dated: _____

SCHOOL/LIBRARY EXECUTIVE

By: _____ Dated: _____

NONPROFIT EXECUTIVE

Proposal Application Cover Page

Organization Information

In preparing your proposal, please include the following information as a 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

- 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: _____

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 that addresses the following prompts. The narrative should not exceed four pages, single-spaced in 11pt font. Any applications exceeding this limitation may be disqualified. 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) **Needs Statement:** 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. Provide any evidence that services rendered have reached or will reach the target population.
- 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 ongoing project-related costs. What are your agency’s 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)?

Example:

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

- 5) **Implementation Plan and Milestones:** 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 have consulted. 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.

Proposal Narrative Cont'd

General Operating Support

- 1) **Alignment to *Education First*:** Briefly explain how your organization addresses the *WECU Education First* initiative.
- 2) **Needs Statement:** 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. Provide any evidence that services rendered have reached or will reach the target population.
- 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 effectively utilize a general operating support grant? Include a list of the top three ongoing funding sources contributing to your organization's mission.
- 5) **Implementation Plan, and Milestones:** Briefly describe your proposed response to the expressed need and the process for shaping this request, considering any partners or community members with whom you have consulted. 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 applies to program support and general operating support in the relevant areas requested:

Area	Indicator
Alignment to <i>Education First</i>	Alignment to <i>Education First's</i> focus, which is to further the learning of students or address the financial literacy needs of individuals. Clearly articulates how proposed activities will contribute to educational goals or increase financial literacy among community participants. If an applicant does not deliver direct educational programming as a Pre-K, K-12 school, community college, technical college, university, library, or is not an organization providing financial education, memorandums of understanding between the nonprofit and the previously mentioned institutions are included.
Needs Statement	<ul style="list-style-type: none"> • Presents a compelling need in the community, addresses disparities thoughtfully, and is substantiated (where possible) using the most relevant demographic data. • Utilization of local data sources is preferred. • Provide evidence that services rendered have reached or will reach the target population.
Organizational Capacity	<ul style="list-style-type: none"> • Agency's history of effective service delivery to the community (including quantifiable outcomes, where available). • Appropriate number of qualified staff and/or appropriate number of qualified volunteers to lead, implement, and evaluate proposed activities. • Demonstrated effort(s) to collaborate with partners or agencies.
Budget and Sustainability	<ul style="list-style-type: none"> • Budget information should be complete and accurate. • Budget estimates should be reasonable and aligned to support proposal activities, objectives, and timelines. • Additional funding sources (financial and in-kind) for the proposed program and services should be identified, where applicable. • Ultimately, the proposed budget should demonstrate the efficient use of WECU resources. • Articulation of plan to secure resources that support the organization and/or program beyond the life of the grant term.
Implementation Plan and Milestones	<ul style="list-style-type: none"> • Clear outline of activities and realistic timeline with relevant and achievable outcomes. • Understanding of possible risks and/or challenges. • Strategies and methodologies applied using sound reasoning. • Performance measurements and other means of assessment are clear. • Commitment to engaging community stakeholders (clients, beneficiaries, and partners) in understanding the need and shaping the proposal. • Demonstrated effort to consult relevant service agencies to develop best practices and shared learning.
Evaluation/Learning	<ul style="list-style-type: none"> • Evaluation plan articulates capacity/resources to assess impact and outputs. • Supplemental qualitative or anecdotal outcomes are encouraged. • The proposal should briefly describe how the organization and/or program is continually learning and improving its services.