



2017 Request for Proposals (RFP)

In 2016, Neighborhood Partnerships was successful in raising additional funding for the Oregon IDA Initiative's 2017-18 contract year through the Oregon IDA Tax Credit. We are excited to announce that the total amount of funds available to grant for the upcoming program year is \$10,125,000. This is an increase of \$775,000 over last year.

Through this funding process, Neighborhood Partnerships (NP) and Oregon Housing and Community Services (OHCS) will be awarding grants to only nonprofit or tribal organizations currently offering IDAs through the Oregon Individual Development Account (IDA) Initiative. We will not review applications for new Fiduciary Organizations (FOs), and new providers will only be considered if partnering with a current FO. A full list of our current FOs may be found [here](#). All partners should be aware that organizations can only maintain a current IDA provider status through one FO at a time.

Please note that all applications will be reviewed based on Initiative standards of excellence in program performance. Information will be drawn from sources that include but are not limited to: on-site annual reviews, quarterly reporting, evaluation reports and data, and ongoing technical assistance with NP. These items will be reviewed along with your application to determine how the FO is meeting the Initiative's standard of excellence and helping us meet other state goals. You are welcome to include discussion on those items, but it is not necessary to go into depth on items on which NP and OHCS are already well versed (i.e. existing program models or structures).

These standards of excellence and state goals include:

State Policy Priorities

- Collaborations with other state resources, partnerships, systems and/or structures that align with asset building and financial capability efforts; and
- Alignment with [Oregon Housing and Community Services \(OHCS\)](#) and [the Governor's](#) priorities, particularly efforts to equitably serve underserved communities.

Exceeding Initiative Standards

- Collaboration, resource sharing, and aligning asset-building efforts among multiple organizations;
- Efficient and maximum usage of funds, including but not limited to technological advances; and
- Projects that have the potential to benefit the entire Oregon IDA Initiative (i.e. lessons that could be shared or replicated).



Proposals are due no later than Wednesday, February 8th by 5PM.

Please submit one copy of the following attachments via email to jjunke@neighborhoodpartnerships.org.

There is a limit of one application per FO.

Awards will be announced by a scheduled phone call on or before March 17, 2017.

Your entire application should be less than ten (10) pages and include:

1. A **coversheet**, specifying the associated FO and primary point of contact for the application;
2. **Responses to the questions** below, not to exceed eight (8) single-sided and single-spaced pages; and
3. A **budget form** detailing your plans to use the Match, Program, and Administrative funds associated with your award.

NP or OHCS may request additional information during the application review process. Please note that supplemental materials other than those specified above will not be reviewed. All proposals must be eligible pursuant to Statute and Administrative Rules pertinent to the Oregon IDA Initiative, ORS 458.670-700 and OAR 813-300 et seq.

Associated timelines:

- January 11th – RFP released to partners
- February 8th – Proposals due by 5pm
- February 9th-March 16th – Proposals reviewed by OHCS and NP
- March 17th – Award decisions finalized
- March 20th-31st – Complete work plans and budgets, FOs work with contract managers to finalize contracts
- April 1st – Awards and contracts effective, new program year begins

If you have any questions, please direct them to:

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Application Questions

Please include discussion of the following topics. If we already know the answer to the question, feel free to reference already existing knowledge without more depth or omit entirely. If we need more information, we will request it.

Vision, Outcomes, and Impact – no more than 1 page

- Explain the vision, purpose, and key outcomes of your proposal. If successful, what impact do you hope to achieve through your IDA project? How will that impact be shared with the entire Oregon IDA Initiative?

Organizational Capacity and Program Design – no more than 6 pages

- Reflecting on the past calendar year, please describe what you've learned and how your program has evolved. What were your most significant accomplishments in 2016? What were your most significant challenges?

Please describe how your organization operates as a Fiduciary Organization.

- Please describe your organization's leadership role as an FO in the Oregon IDA Initiative:
 - What unique expertise do you bring to the FO table? How will your organization contribute to the growth and success of the entire Oregon IDA Initiative?
 - Is your organization able to commit to participating fully in the FO leadership role over the 2017-18 program year? What does that look like?
- Please describe your organization's administrator role as an FO, in particular:
 - How does your program staff work across departments within your agency?
 - What challenges do you face? How are you supported in solving those challenges?

Please describe your proposed 2017-18 IDA project, including any new goals or innovations.

- What opportunities and challenges do you anticipate taking on in 2017-18?
- How are you considering strengthening your project's alignment with other state resources – leveraging already existing work of other agencies or creating more efficient systems to support participants? What challenges do you foresee in this effort?
- Which communities do you intend to work with and how will you reach them? Why is your organization best equipped to serve them?
- Will you develop new or deepen existing partnerships; if so, how? Are you considering any shifts away from current partnerships; if so, how and why? How do you plan to coordinate with other FOs who may be partnering with the same organizations in other or similar ways?
- Is your organization or network interested in piloting any new savings goals? If so, how will the expansion strengthen the Oregon IDA Initiative? What programs or plans do you already have in place that would support your expansion of asset categories?

Timeline for Implementation – no more than 1 page

- Please include a timeline for implementation, including a plan to over-allocate matching resources granted by March 31, 2018.

Proposed Use of Funds – no more than 1 page (this limit does not include the budget form)

- Seventy-five percent (75%) of award funds may be used for participant matching funds, twenty percent (20%) of funds granted for case management and education, and five percent (5%) for program administration. Please use the budget form attached to this application to briefly describe how you would use each category. If the standard percentages do not fit your project's needs, you may adjust the percentages in the form and include 1-2 paragraphs in your narrative describing why the proposed percentages are necessary.
- What other resources will you be leveraging with your IDA funds? How long will your budget for these grant funds last? Is there a point at which the program and admin to support clients associated with this award will need to come from another source?