



**National CAPACD Request for Proposals
2022 *Financial Capability in AA & NHPI Communities***

RFP Release Date: Wednesday, June 29, 2022

RFP Due Date: Thursday, July 21, 2022

[Informational Webinar: Wednesday, July 06, 2022](#)

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1. SUBMISSION GUIDELINES

Complete and submit the entire Sub-grant Application and submit by **Thursday, July 21, 2022** through your Foundant portal. The quality of your RFP responses will influence your sub-award allocation.

For questions regarding this RFP, email Camille@nationalcapacd.org and CC RFP@nationalcapacd.org.

RFP Materials

- To view **National CAPACD Sub-grant Application guidelines**, click [here](#).
- To view the **instructions for accessing the online grant application portal**, click [here](#). You will first need to create a Foundant account with National CAPACD in order for your organization to access the RFP application.
- If you already have a Foundant account with National CAPACD, click [here](#) to directly access the *Financial Capability - AA & NHPI Communities 2022* Application via our online grant portal.

2. APPLICATION TIMELINE

| Dates | Activity |
|------------|---|
| 06/29/2022 | RFP released |
| 07/21/2022 | RFP deadline |
| 07/06/2022 | RFP Informational Webinar (click the link for registration) |
| 08/02/2022 | Subgrantees selected and notified |
| 08/31/2022 | Contracting will be completed by the end of August |
| 08/24/2022 | Sub-grantee orientation |

3. PROJECT SUMMARY AND PURPOSE

The *Financial Capability in AA & NHPI Communities 2022* Request for Proposals invites community-based organizations to submit applications for funding to support financial capability program(s) that serve low-income Asian Americans, Native Hawaiians, and Pacific Islanders (AA & NHPIs). Selected organizations will implement a program(s) that assists low-income AA & NHPIs in building their assets and creating pathways to greater economic opportunity for themselves, their families and/or their communities. Ultimately, it is our hope that beneficiaries of the program will demonstrate increased financial knowledge and confidence, and increase their access to and usage of safe and affordable financial products (e.g. – savings accounts, credit builder loans, IDAs, mortgages, etc.).

This sub-grant is intended for organizations that have established themselves as leaders in the asset building field. For this reason, applicants must meet the following criteria for a **performance-based** sub-grantee:

Have a proven track record or have developed the organizational capacity to offer effective and quality services to a high client volume, or other significant deliverables outlined by National CAPACD or National CAPACD’s donors.

This sub-grant is made possible with generous support from Wells Fargo.

4. GRANT PERIOD

Awards will have a grant period of July 1, 2022 – May 31, 2023.

5. REPORTING REQUIREMENTS

Subgrantees will be required to submit an interim progress report and a final report via National CAPACD’s online grant portal, Foundant.

6. GRANT AWARD DETAILS

- The funding will support **up to 6** sub-grants.
- Awardees will receive a minimum of \$25,000 and a maximum of \$30,000.
- Awardees will also receive travel stipends to attend all required events (e.g. – orientation, trainings). Scholarships may also be available to attend additional professional development opportunities as they are deemed appropriate.
- Final client delivery expectations will be negotiated upon contracting.

7. REQUIRED ACTIVITIES

1. Provide group financial literacy workshops on asset-building topics such as budgeting, increasing savings, reducing debt, and building credit.
2. Provide one-on-one financial coaching on asset-building topics such as budgeting, increasing savings, reducing debt, and building credit.
3. Provide services that increase access to financial products such as IDAs, lending circles, credit builder loans, etc.
4. Capture and report on client changes in monthly savings rate, amount of debt, and credit score, as well as establishment of credit score.
5. Participate in the data collection for a community needs assessment to better understand the specific financial needs of limited English proficient, LMI AAPIs during this period of economic recovery.

8. ELIGIBLE APPLICANTS

- This RFP is open to all interested 501(c)(3) organizations (we do not fund individuals) with a 501(c)(3) status as determined by the IRS OR is an organization fiscally sponsored by a 501(c)(3) organization.
- Conduct work and services in the United States and the Pacific Islands.
- Be a community-based organization that serves and represents low-income AA & NHPI communities.
- Applicants are not required to be a member of National CAPACD to respond to Requests for Proposals but are highly encouraged to become a member organization.

9. SCORING CRITERIA

National CAPACD will use the following criteria to score sub-grant applications.

| Category | Scoring % |
|--|-----------|
| <p>Program Design:</p> <ul style="list-style-type: none"> ● Is the proposed program(s) clearly defined and achievable during the grant period? ● Is the proposed program(s) effective in achieving programmatic goals? | 30 |
| <p>Reaching Underserved Communities:</p> <ul style="list-style-type: none"> ● Does the organization have the experience or capacity to serve LMI AA & NHPI individuals in a culturally responsive way? (<i>eg - provide in language services or resources</i>) ● Does the area that the organization serves either have: <ol style="list-style-type: none"> a. a historically high population of AA & NHPIs who are low-income, experiencing poverty, or refugees, but are now facing displacement threats b. an emerging population of AA & NHPIs who are low-income, facing poverty, and refugees because of displacement or other urgent issues. ● Does the organization primarily serve low-income AA & NHPI populations? | 25 |
| <p>Organizational Soundness:</p> <ul style="list-style-type: none"> ● How does the program align with the organization's overall mission and does it have the capacity to sustain activities? ● How are program activities staffed and what are staff qualifications? | 25 |
| <p>Alignment of Values:</p> <ul style="list-style-type: none"> ● How does the organization's mission, vision and conduct align with National CAPACD's efforts to build a strong community-based coalition? ● How does the organization's mission, vision, and conduct align with National CAPACD's efforts to build a connected coalition? <p><i>Note: Click here to view National CAPACD's Theory of Change as it relates to this scoring criteria.</i></p> | 10 |

| | |
|---|------------|
| Evaluation <ul style="list-style-type: none"> • How does the organization currently track program outcomes and utilize this information to improve client service delivery and further sustain the program? | 10 |
| TOTAL POSSIBLE POINTS | 100 |

10. APPLICATION CHECKLIST

- Application form, including narrative and budget information
- Most recent IRS Form 990 or audited financial statements
- IRS 501(c)(3) determination letter or fiscal sponsor agreement with a 501(c)(3) nonprofit
- Organization chart
- OPTIONAL: 1-2 program-specific materials you wish to add that would be helpful for grant application reviewers (e.g. curriculum, reports, etc.)

11. QUESTIONS/ FURTHER INFORMATION

Please email Camille@nationalcapacd.org and CC rfp@nationalcapacd.org if you have any questions. Questions received through other avenues (e.g. phone calls, emails directed to individual National CAPACD staff) will not receive a response.