WORKBOOST National

Request for Proposals: National Financial Security Ecosystem

To submit a proposal, please send your answers to the following questions, with your signature attached, to our partnerships team at partnerships@thefinancialclinic.org

1. Organization name, headquarter location, mission, and Executive Director name and email.
2. Provide a brief overview of all the workforce programs offered by your organization. Please describe how many people each program reaches in a year and the nature of the engagement that program participants have with your organization (ongoing, one-time only, etc). (*500 words or less)*
3. What financial barriers arise that impede participants' progress in your programs? (*250 words or less)*
4. Describe any history your organization has in providing financial capability services, including but not limited to financial education, financial counseling, financial coaching, either on your own or through partnership with others. (*500 words or less)*
5. Describe why your organization is interested in implementing financial security work. What is your organization's goal in participating and how do you envision integrating light touch coaching (such as pulling credit reports, identifying financial goals, or developing a savings plan) into your existing programs? (*500 words or less)*
6. Please identify: A point person to coordinate the implementation of the financial security ecosystem at your organization (a.k.a. the "Ecosystem Ambassador"). Describe how this person has sufficient decision making power to effect the necessary changes in organizational culture to ensure the success of this project. Experience in starting a new project, flexibility, and creative problem solving will be critical for project success. This person must be available on a monthly basis for Technical Assistance calls, among other scheduled engagements. (*250 words or less)*
7. Describe the staff who will be trained to do light touch coaching with your program participants. Describe any qualifications and/or experiences of your staff and/or organization that demonstrate your capacity in this area. Please include an organizational chart or staffing structure illustration. Please also provide an estimate of how many staff members you are seeking to train in year one and if possible, how many participants you hope to serve. (*250 words or less plus a staff chart)*
8. Describe how you plan to sustain this work beyond the time of this initiative. Sustainability could include your organization's plans in areas such as fundraising, program activities, staff capacity, and professional development. (*250 words or less)*
9. Please describe, including your CRM system, how you currently measure your organization's outcomes (mission and impact) and how you measure your participant outcomes. How does data inform program and staff direction at your organization? Do you have a designated data manager or point person for data other than the Ecosystem Ambassador? (*500 words or less)*
10. What partnerships do you have, if any, that have led to lasting or systemic change in your communities? What role do you envision playing as a community change agent over the next year?(*500 words or less)*
11. Please submit the following aggregate data for 2017 for your organization. Please indicate if this is data from one, multiple, or all of your organization's programs.
    - Program completion rate
    - Job placement rate
    - Average wage
    - Average hours
    - 90 day retention rate

12. Please indicate if you have / intend to develop partnerships with any other local applicants. We seek to honor and reward community partnerships who are hoping to expand or create local relationships through this project.

Please indicate with your signature that you are aware of the following requirements:

- You are a workforce development organization or operate workforce development programs.
- You will host an expert financial coach provided by the Clinic either on-site or virtually one day per week. Virtual hosting can include things like providing a computer and phone for participants to speak to the financial coach.
- Your program staff will provide light-touch financial coaching after the provided training which could include the following items:
    - Identify a financial goal
    - Create a spending plan
    - Calculate financial transaction costs
    - Pull a credit report
    - Calculate total debt
    - Refer to a free tax site
- Your staff will make referrals to the expert financial coach on site
- You will track customer data in Change Machine.
- You will pay a partially subsidized subscription to Change Machine.
- You will share organizational, programmatic, outcome, and customer-level data (including workforce-specific) with the Clinic which includes access to your internally-tracked indicators -- such as placement, retention, starting wages -- in addition to your Change Machine data.

Signature	Printed Name	Date

The Financial Clinic
Creators of **Change Machine**