



Citi Foundation



REQUEST FOR PROPOSALS

August 10, 2018

Revised September 6, 2018

I. PURPOSE AND OVERVIEW

A. Purpose

In July 2018, Local Initiatives Support Corporation (LISC) received a grant award from the Citi Foundation to support the expansion of LISC's contextualized bridge training program model, Bridges to Career Opportunities (BCO). This grant allows LISC to scale the BCO program in new and existing markets by making grants to eligible organizations.

To that end, LISC will accept proposals to implement the Bridges to Career Opportunities program model from existing LISC-funded Financial Opportunity Centers including those who are currently implementing the Bridges to Career Opportunities program. LISC may open this request via invitation to organizations not currently offering Financial Opportunity Center services if they are in a high need, under-served area such as a rural community.

LISC intends to award three-year implementation grants (2019-2021) to support activities described in this Request for Proposals (RFP) to 40 organizations. Beginning in January 2019, approximately 20 Financial Opportunity Centers or Rural programs seeking to launch new Bridges to Career Opportunities programs will be awarded grants totaling \$190,000 payable in two installments supporting a three-year implementation period (January 2019 through December 2021). The first grant payment will be made in January of 2019 and then, dependent on performance, the grant will be renewed in January 2020 at which point the second payment will be made.

Additionally, approximately 20 organizations seeking to scale or expand their current Bridges to Career Opportunities programs will receive up to a total of \$170,000 payable in two installments supporting a three-year implementation period (January 2019 through December 2021). The first grant payment will be made in January of 2019 and then, dependent on performance, the grant will be renewed in January 2020 at which point the second payment will be made.

LISC will solicit grant applications in two categories:

- **Category 1 – Financial Opportunity Center or Rural Program Only:** Organizations that have been operating an integrated services delivery model (having integrated employment services, financial coaching, income supports access), and are proposing to add sector based bridge programming to their Financial Opportunity Center offerings **OR** are a LISC Rural partner invited to apply for this opportunity.

- Category 2 – Financial Opportunity Center with Bridges to Career Opportunities:**
 Organizations that have been operating both a Financial Opportunity Center model and a bridge program for at least one year, and are proposing to: a) scale up the scope of their bridge/ISD program by adding new bridge modules (for example, a new contextualized bridge focused on an additional industry); and/or b) provide additional bridge for career advancement (for example, providing a bridge for participants looking to advance in their given career pathway) and/or c) innovate on existing bridge pathways (for example, adding a retention coach to focus on career advancement). To be considered as a Category 2 site, you must be a current recipient of a LISC Social Innovation Fund Bridge grant. All other organizations should apply under Category 1.

LISC will hold one informational webinar to give an overview of the RFP, discuss grant expectations, and answer potential grantee questions on August 22 at 2:00 pm EST. Call-in information will be posted on LISC’s FOC website (www.foc-network.org). Attendance on this webinar is not mandatory in order to submit an application, but it is highly recommended. A recording will also be made available. All interested applicants should complete the Bridges Applicant form to receive regular updates on this RFP: <https://goo.gl/forms/Qgiib46m1cui8orz2>.

B. Minimum Qualifications for Applicants

- The applicant is a current LISC-funded Financial Opportunity Center including sites currently running the Bridges to Career Opportunities program **or** is identified as a target group through LISC’s Rural program.
- The applicant has the capacity to offer career pathways programming which may include contextualized “bridge” programming (defined below) and occupational skills training, workforce development, financial counseling and coaching, and public benefits access services. The organization also has a demonstrated strategy for long-term client engagement and advancement.
- Consortiums will not be considered under this RFP. All core services (financial coaching, employment coaching, income supports and Bridge training as defined below) must be offered by a single entity.
- Applicants must demonstrate prior success in offering contextualized bridge programming/skills training, workforce development, adult occupational training, and/or a strong integrated services program, which combines workforce development services with financial coaching services.
- Applicants must have existing industry/employer partnerships, and the capacity and willingness to cultivate and maintain substantive industry/employer engagement.
- Applicants are serving low-income communities and individuals. Low and moderate income is defined as individual income that is less than 80% of the FFIEC-estimated Median Family Income. LISC will award additional points to those organizations located or working in an Opportunity Zone as designated by Department of the Treasury (<https://www.cdfifund.gov/Pages/Opportunity-Zones.aspx>).
- Applicants have had an independent audit of their finances within the last two years.
- Applicants are not seeking funding that is more than 20% of the organization’s total organizational budget.
- Applicants can show a 25% match from either private or governmental sources. LISC will determine total award funds based on the type of application and the year of the award. Successful applicants will have existing sources of funding that will be leveraged under this award.
- Applicants must utilize the approved LISC client management system to track data.

11. Organizations' existing programming must fit within Category 1 or Category 2, as described above in Section I.A.
12. Applicants must share any curriculum developed through this initiative with LISC and the larger network of grantees offering Bridges to Career Opportunities.
13. Applicants must participate in events, which may call for information/resource sharing. These may include, but are not limited to: meetings with LISC, the national FOC convening, presentations to FOCs and other entities, and publications or research that may be done on this matter.

C. Background

LISC is a national nonprofit intermediary organization founded in 1979 and dedicated to helping other nonprofit community development organizations transform distressed neighborhoods into healthy and sustainable communities of choice and opportunity—good places to work, do business and raise children. LISC supports community efforts to increase family income, wealth, and employment in its comprehensive investment neighborhoods. This effort is designed to complement LISC's traditional housing and economic development efforts by addressing a broader range of family economic success challenges. LISC's overall investment is guided by the following program strategies:

- Strengthen existing alliances while building new collaborations to increase our impact on the progress of people and places
- Develop leadership and the capacity of partners to advance our work together
- Equip talent in underinvested communities with the skills and credentials to compete successfully for quality income and wealth opportunities
- Invest in businesses, housing and other community infrastructure to catalyze economic, health, safety and educational mobility for individuals and communities
- Drive local, regional, and national policy and system changes that foster broadly shared prosperity and well-being

For more information about LISC, please visit our web site: www.lisc.org.

The Citi Foundation has partnered with LISC for over 25 years and was the lead private funder in the national expansion of LISC's Financial Opportunity Centers. The Foundation's support helped create a network of now over 85 Financial Opportunity Centers across the United States that serves 20,000 people annually.

The Foundation's mission is to promote economic progress and improve the lives of people in low-income communities around the world. The Foundation invests in efforts that increase financial inclusion, catalyze job opportunities for youth, and reimagine approaches to building economically vibrant cities.

Through Bridges to Career Opportunities, the Citi Foundation is expanding and building from its longtime work in economic mobility and employment for youth to address the diverse employment challenges faced by adults in communities across the United States. Bridges to Career Opportunities builds on the Citi Foundation's learnings from its Pathways to Progress initiative, a commitment to help prepare youth around the globe for today's competitive job market. Since 2014, the Citi Foundation has invested over \$90 million into youth employment programs. Through its experiences working with youth via Pathways to Progress, the Citi Foundation recognizes that it's not enough to connect individuals to jobs but that certain supplemental services are critical to help participants eventually advance to the next level in their careers.

For more information about the Citi Foundation, visit www.citifoundation.com.

D. Bridges to Career Opportunities Overview

LISC's Commitment to Family Income & Wealth Building

LISC's national Family Income and Wealth Building (FIWB) program works with local LISC offices and community-based organizations to implement the Financial Opportunity Center (FOC) model: a proven integrated services delivery strategy designed to equip families with the tools, motivation, and know-how to boost earnings, build credit, reduce expenses, and make sound financial decisions that build assets. Each client who walks into an FOC has access to a network of coaches who can help him or her tackle financial problems from multiple angles: career coaches focus on job placement, retention, and advancement; income support coaches provide access to public and private benefits that can supplement earnings; and financial coaches help clients identify personal goals and manage finances toward that end. Operated by trusted community-based agencies, FOCs forge long-term relationships among clients and coaches. LISC provides grant funding, technical assistance, and peer-learning opportunities to its network of FOCs that currently numbers over 85 Centers in over 30 cities across the country.

The Need for Supported Bridge Programs

LISC first piloted its Bridges to Career Opportunities initiative in 2013 to support community-based organizations to connect neighborhood residents to essential job readiness competencies, skills training and credentialing, and comprehensive supportive services—by leveraging existing systems and resources as well as developing new program elements. Since then, thirty-two agencies have adopted the model, funded through the Corporation for National & Community Service. While many nonprofit agencies have a long history of offering training and job-search assistance, Bridges to Career Opportunities seeks to enhance those offerings by incorporating several key components that are essential to participants' long-term success in training and careers. Unlike traditional, standalone training or education programs, LISC's Bridges to Career Opportunities is built on the integrated services delivery platform of the Financial Opportunity Centers. All Bridges to Career Opportunity sites are also Financial Opportunity Centers. The package of core FOC services helps ensure that clients are able to address personal and social barriers throughout their academic and career path.

Bridges to Career Opportunities is a career pathways program—which includes the following components (with multiple on ramps for program entry, depending on the need of the participant): bridge curriculum, skills training, placement, advancement, and supportive services. Supportive services must include (but are not limited to) financial coaching, career coaching, and income supports access which are offered throughout the clients' career path. Although the focus of LISC's early Bridges to Career Opportunities program concentrated on entry-level bridges, this Citi Foundation project is an opportunity to focus on building out other components of BCO including higher-level bridges, advancement & retention coaches. This project is also an opportunity to broaden the career pathways opportunities to additional in-demand industry sectors. Therefore, the expectation is that existing Bridge sites will use the funds to build deeper bridges, bridges into new industries, and support career advancement. If applicants focus on higher-level bridges, they must demonstrate the ability to provide an on-ramp for clients at lower basic education levels, if they represent a significant portion of the sites target population.

Bridges to Career Opportunities Core Program Components

Bridge Programming. The initiative’s “bridge” component directly addresses the academic readiness gaps that too many low-wage and unemployed adults face. Bridge programs provide participants with the foundational skills (such as math, literacy or English as a Second Language) that help them to qualify for and be successful in training programs. Equally crucial, the bridge programming is also *contextualized*, meaning that the curriculum incorporates industry-specific content into fundamental math, literacy or English lessons. (For instance, lessons in a contextualized bridge program for health care careers might use the dial of a blood-pressure monitor to illustrate principles of geometry, or word problems that teach ratios, division or multiplication by asking students to calculate the appropriate medication dosage for a patient of a certain height and weight.) With this contextualization, adult learners can see the practical application of the basic skills, while simultaneously learning technical, industry-specific concepts. The bridge component can lead to initial, entry-level training, but it may also bridge into higher-level technical training and/or college programs.

Coaching, Navigation and Supportive Services. In addition to group-based education, Bridges to Career Opportunities sites will offer one-on-one services focusing on trust, client relationship building and coaching. Coaches are committed to “meeting” their clients at whatever step on the career or academic ladder they may be—and helping to provide the navigation, support and motivation to ensure the client’s successful completion of basic education, middle skills training and higher levels of the career pathway. Bridges to Career Opportunities sites will have financial coaches and career coaches/employment coaches providing one-on-one, in-person services built in to their model. Coaching services will be provided through the training program and into job placement and career advancement as clients move up a career pathway. Beyond one-on-one counseling, all clients will be screened for public benefits.

Employer Engagement and Demand-Driven Training. LISC’s mission is to ensure that skills training and other FOC services all build toward clients’ long-term prospects for economic opportunity. For this reason, the Bridges to Career Opportunities initiative includes a strategic and intentional focus on sectors or industries that are slated for growth in the city/region, based on labor market projections and employer outreach. This focus offers a “win-win” for the community: helping employers meet their hiring needs keeps the local economy strong, while stable employment opportunities help BCO clients build work experience, longevity and on-the-job skills. All Bridges to Career Opportunities sites should engage employers in an advisory role either through a direct feedback loop or through employer advisory councils. This feedback/advisory role should include a review of curricula, understanding of required soft skills and additional engagement as necessary.

Industry-Recognized Credentials and Certifications. Bridges to Career Opportunities prioritizes attainment of industry-recognized credentials, so that participants will have marketable, employer-validated skills. The initiative also encourages a focus on credentials that are both “portable” (valued and recognized by employers across the industry, so that the credential will continue to be an asset to job-seekers regardless of whether they move to a new company or a new city) and “stackable” (credentials that articulate seamlessly from one level to the next but also have standalone value, such that an individual can take a temporary break from the education pathway and still use the intermediate credentials in the job market).

Clearly Defined Academic and Career Ladders. It is crucial for Bridges to Career Opportunities sites to clearly illustrate to current and prospective training participants the steps in their chosen career pathway, the time investment in training required by each part of the pathway, and the types of jobs and wages that can be achieved by completing each level of training/credentialing. While training can sometimes be a harder sell to clients facing multiple barriers, FOCs have found that by sketching out the academic and career ladders, clients are able to see the potential benefit of training today.

II. PROPOSAL GUIDELINES

A. Applicant Categories

Core selection factors (detailed in Section II.B. below) are consistent across applicant categories; however, each category of applicant has its own set of questions to address in the proposal.

Applicants must select **only one category** in which to apply:

- **Category 1 – Financial Opportunity Center or Rural Program Only:** Organizations that have been operating an integrated services delivery model (having integrated employment services, financial coaching, income supports access), and are proposing to add sector based contextualized bridge programming to their integrated services offerings **OR** are a LISC Rural partner invited to apply for this opportunity.
- **Category 2 – Financial Opportunity Center with Bridges to Career Opportunities:** Organizations that have been operating both a Financial Opportunity Center model and a bridge program for at least one year, and are proposing to: a) scale up the scope of their bridge/ISD program by adding new bridge modules (for example, a new contextualized bridge focused on an additional industry); and/or b) provide additional bridge for career advancement (for example, providing a bridge for participants looking to advance in their given career pathway) and/or c) innovate on existing bridge pathways (for example, adding a retention coach to focus on career advancement). To be considered as a Category 2 site, you must be a current recipient of a LISC Social Innovation Fund Bridge grant. All other organizations should apply under Category 1.

Please carefully review the selection factors in Section B. These selection factors apply to applicants in both categories.

Please also carefully review the Applicant Categories and make sure that: 1) you have chosen the applicant category that best fits your organization and current programming; and 2) your proposal narrative answers the questions in either Section II.C., or Section II.D., depending on which applicant category you have chosen.

Proposals that address more than one category of questions will be considered non-responsive to this RFP and will not be reviewed. Proposals that respond to a set of questions that do not match the applicant category will also be considered non-responsive to the RFP and will not be reviewed. Contact your local LISC office for clarification if you are unsure which applicant category fits your organization/program.

B. Selection Factors

All applicants must meet the following selection factors:

1. Bridges to Career Opportunities is a career pathways program—which includes the following components (with multiple on ramps for program entry, depending on the need of the participant): Bridge curriculum, skills training, placement, advancement, and supportive services. Supportive services must include (but are not limited to) financial coaching, career coaching, and income supports access which are offered throughout the clients career path. Although the focus of our

early Bridges to Career Opportunities program concentrated on entry-level bridges, this Citi Foundation project is an opportunity to focus on building out other components of BCO including higher-level bridges, advancement & retention coaches. This project is also an opportunity to broaden the career pathways opportunities to additional in-demand industry sectors. Therefore the expectation is that existing Bridge sites will use the funds to build deeper bridges, bridges into new industries, and support career advancement. If this project focuses on higher-level bridges, the site must demonstrate the ability to provide on-ramp training and support.

- a. The key outputs and outcomes for Bridges to Career Opportunities are:
 - i. bridge program completion (for those who require it)
 - ii. matriculation into occupational skills training
 - iii. achievement of a post-secondary credential, occupational certificate/credential or degree
 - iv. job placement, retention, starting wage and advancement wage
 - v. quantitative financial measures such as increase in credit score, movement to positive net income and wage advancement.
- b. New Bridges to Career Opportunities sites (Category 1) must demonstrate their capacity to address clients' career needs by proposing a clear training and career pathway leading to credential attainment and/or opportunities for advancements in their desired careers.
- c. Existing Bridges to Career Opportunities sites (Category 2) must clearly show how their proposal innovates on their existing program by doing at least one of the following:
 - i. scales up the scope of their bridge program by adding new bridge modules (for example, a new contextualized bridge focused on an additional industry)
 - ii. provides additional bridge for career advancement further up the career ladder (for example, providing a bridge for participants looking to advance in their given career pathway)
 - iii. innovates on existing bridge pathways (for example, adding a retention coach to focus on career advancement)
 - iv. Please note, applicants who do not demonstrate a clear innovation or expansion of existing program will not be considered.

2. Application Structure

- a. All proposals should have a sole applicant; applications from consortia of organizations are not permitted.
- b. Organizations must have the capacity to provide *all* core Bridges to Career Opportunities services themselves, at one physical location. (The core BCO services are the contextualized bridge program, ongoing employment/career coaching, financial coaching, and income supports access).
- c. Applicants may not further grant funds to additional entities to undertake the work. However, applicants may hire consultants to perform services under the contract.
- d. Partnerships for training beyond the core Bridge program and with local workforce systems or employers are necessary for successful program implementation. More information is given in Section II.B.3 below.

3. Required and Recommended Partnerships

- a. As Bridges to Career Opportunities is a comprehensive and highly collaborative model, LISC expects that grantees will build substantial partnerships with community stakeholders that are necessary to facilitate program success.

- b. Bridges to Career Opportunities requires, at a minimum, that grantees establish partnerships with the following entities. Proposals without these core partnerships or the ability to quickly develop these partnerships will not be considered.
 - i. *Employers.* Local employers play a critical role in successful contextualized bridge programs; grantees are expected to engage employers in all aspects of the bridge program, including program/curriculum design in order to effectively understand hiring needs and skills/competencies employers are seeking from job candidates.
 - ii. *Skills-training providers.* If Grantees do not offer in house technical skills training, Grantees must partner with community colleges and/or other community-based skills training providers to improve the pathways from the bridge program into next-level skills training. In some cases, skills training may be provided by the grantee, however, it must lead to an industry-recognized credential or certificate.
 - c. Additional partnerships beyond employers and skills training providers are recommended for program success. Types of partnerships will vary based on grantee’s existing program offerings and the needs of their client base, but other types of partners that may be helpful include:
 - i. *Human services agencies,* if needed in order to facilitate or streamline income supports access.
 - ii. *Financial services providers* to help participants connect to fairly priced banking and credit products. (The proposal scoring includes bonus points for applicants who propose to incorporate financial products—for example, employer-sponsored small-dollar loans, Twin Accounts credit-building loans, or lending circles—into their program design.)
 - iii. *Health and mental health providers,* if the grantee identifies health-related issues as a barrier to success in education and training.
 - iv. *Legal services providers,* if the grantee’s client base has need for specialized services such as criminal record expungement or civil legal representation to resolve issues that would otherwise prevent clients from succeeding in training.
4. Data and Performance Management
- a. Data reporting and reflection on program outcomes data is important to continuous improvement in programming. The applicants must demonstrate how they currently use outcome data for program improvement.
 - b. Applicants must commit in their proposal to using the common data system that all of LISC’s integrated services delivery partners currently use. (LISC will provide training on the system and ongoing technical assistance.)
5. Commitment to Underserved Communities
- a. Applicants must currently be serving (and propose to serve) low-income communities and individuals. Low and moderate income is defined as individual income that is less than 80% of the FFIEC-estimated Median Family Income.
 - b. Extra points will be given to those organizations that are located or working in a Department of Treasury designated Opportunity Zones (<https://www.cdfifund.gov/Pages/Opportunity-Zones.aspx>).
6. Organizational Capacity to Manage Program and Grant
- a. Applicants must have core funding in place for the organization’s basic operations.

- b. Organizations must be able to provide 25% matching funds for LISC's grant award.
- c. Applicants must have written financial management procedures.
- d. Applicants must have an audit conducted within the past two years and an IRS nonprofit determination letter.

Proposals may be awarded up to 100 points, with the possibility for seven additional bonus points, for a total maximum score of 107.

D. Applicant Category 1: Financial Opportunity Center or Rural Program Only

**** ONLY answer this set of questions if you meet the criteria for a Financial Opportunity Center or Rural Program only provider as described in Section II. A.****

1. Complete the **Cover Page** in Appendix 1.
2. **Summary:** On a separate page from the main narrative, summarize your proposal in five sentences or less.
3. **Existing Program Services and Proposed Program Innovation: 45 points**
 - a. Describe why your FOC/Rural site is positioned to be a site for this initiative. Include the following **(10 Points)**
 - i. How long your organization has been operating as an FOC/Rural site.
 - ii. The "platform" upon which you deliver integrated services (in other words, if applicable, what type of services/assistance are your clients generally seeking when they come through the doors of your agency)
 - iii. Please also specifically describe what types of employment, workforce development, and adult basic education services you currently offer
 - b. Describe the bridge program that you propose to implement with grant funds, specifically describe each component of the program: **(25 Points)**
 - i. Access to Public Benefits
 - ii. Financial Coaching
 - iii. Career Coaching
 - iv. Contextualized Adult Basic Education (the bridge)
 1. Proposed minimum entry criteria for bridge program participants (i.e., will there be a minimum reading and math level, or other testing criteria for eligibility).
 2. Assessments (i.e., pre- and post-tests) that you propose to use to gauge participants' skill levels and the effectiveness of the bridge.
 3. When and where you propose to offer the bridge curriculum (what days a week, what time each day).
 4. Whether your proposed bridge curriculum will be cohort-based or open enrollment; and if cohort-based the anticipated duration of the bridge course.
 - v. The overall training and career pathway
 1. The career pathway(s)/sector(s) into which your program facilitates entry, and the academic pathway that accompanies that career pathway. (Proposals should include a brief narrative overview of the career and academic

pathway(s); include a graphic illustration of the pathway as an attachment to the proposal, per Appendix 2 of the RFP.)

- a. Description of the skills training provider including who is providing the training, the length of the training and if the training leads to a credential.
2. The rationale for choosing that pathway/sector, specifically: job demand and/or growth projections in your region for the chosen industry/sector; the extent to which the industry is accessible to and meets the needs of the population that you serve; and the potential for career growth and wage gains in that sector.
- vi. Your organization's three-year plan for implementing and growing your bridge program(s)
- c. Discuss how you will ensure seamless integration of the proposed new bridge program into your existing bundle of financial coaching, career coaching and income supports services. **(10 Points)**
 - i. Describe how you will ensure that all bridge and FOC services will be delivered to clients in an integrated fashion; also describe how you will facilitate ongoing, long-term engagement with clients.
 - ii. While not required, LISC strongly encourages that applicants incorporate financial products (for example, employer-sponsored small-dollar loans, lending circles, or credit-building products like LISC Twin Accounts) into the program design. (LISC will award up to **5 extra points** to proposals that discuss the applicant's plan for integrating financial products into their program)

4. Target Neighborhood

Scoring: 2 points

- a. Identify the geographic location of the proposed services and the area served
- b. Indicate whether your organization is located or working in a federally designated Opportunity Zone. LISC will award **up to 2 bonus points** to applicants located or working in an Opportunity Zone.

5. Target Population

Scoring: 3 points

- a. Describe the population your organization currently serves including details on race, ethnicity and gender.
- b. If different from above, describe the population you intend to serve through the Bridges to Career Opportunities program.
- c. Explain your outreach strategy for your existing bridge program; indicate whether you plan to continue using this outreach strategy for your proposed BCO program or what, if any, changes or additions you plan to make.
- d. Will this program serve a population of over 50% low- and moderate-income (LMI) individuals? Y/N Low and moderate income is defined as individual income that is less than 80% of the FFIEC-estimated Median Family Income. Give a specific description of how you determine the answer provided in the previous question.

6. Organizational History and Capacity

Scoring: 10 points

- a. Describe the organization proposing to implement the Bridges to Career Opportunities initiative, with a particular focus on organizational capacity and experience. Cite examples of

how the organization typically applies its skills and resources to accomplish its goals and satisfy its stakeholders' expectations.

7. Partnerships with the Workforce Development field

Scoring: 10 points

- a. Describe your current connections to or working relationships with workforce development agencies and collaboratives in your community/region. (Examples might include your local Workforce Investment Board and/or One-Stop Career Center, Chambers of Commerce, regional industry associations, National Fund for Workforce Solutions affiliates, etc.)
- b. Describe how you will leverage your relationships/connections with employers, workforce development agencies and training institutions to implement your proposed program.
- c. Do you have an industry advisory board that you consult in the design and modification of your existing employment services? If you do have an advisory board, please describe its purpose, structure/participants, and the type of input it provides. If you do not have an advisory board, please discuss your plan for creating one.
- d. Describe your employer relationships including: the name of the employer, industry sector, nature of the relationship (i.e., what sort of resources/services/advisement does the employer provide to your organization, and vice versa).
- e. Indicate whether your organization provides any occupational skills training in-house or in conjunction with a skills training provider, such as a community college or a local workforce development board. (Note that this refers to occupational skills training programs, and *not* contextualized bridge/basic education programs that are specifically designed to equip adult learners with the foundational skills—reading, English, math, digital literacy, etc.—in *preparation* to enter a skills training program.)
- f. Applicants must have at least one Memorandum of Understanding (MOU) in place with either an employer or an occupational skills training provider; the MOU should address the employer or training entity's commitment to partner with your organization and specific roles that your organization and your partner will fill. MOUs do not need to be newly created and specific to this BCO grant proposal; existing MOUs with partners are acceptable.

8. Staff Qualifications

Scoring: 5 points

- a. Who will lead this program? What are the strengths, expertise and track record of your organization and the key individuals leading the program that will insure successful implementation? Please also include the industry experience of bridge instructors and skills training instructors.

9. Performance Indicators

Scoring: 15 points

- a. How many people do you serve each year through the FOC?
- b. **Complete Performance Outcomes chart in Appendix 2 per the following instructions:**
 - i. Please complete the chart in Appendix 2 and provide narrative and data in text form as well. Note that the Performance Outcomes chart should include outcomes from the most recent 12-month period that you have for your existing program *and* the outcomes that you propose to achieve in Years 1-3 of your Bridges to Career Opportunity program, if awarded a grant.

- ii. Category 1 and 2 applicants are all required to complete the same Performance Outcomes chart, although it is expected that Category 1 applicants will not have prior-year data pertaining to a bridge program. Please enter “n/a” for any prior-year outcomes that you do not have available; however, be sure to project Year 1-3 goals for *all* of the outcomes in the Performance Outcomes chart.

10. Budget

Scoring: 10 points

- a. Please review and use Appendix 3 as a guide in the development of the budget.
- b. Please provide a narrative of the expenses.

E. Applicant Category 2: Financial Opportunity Center with Bridges to Career Opportunities Programs

**** ONLY answer this set of questions if you meet the criteria for Category 2 as described in Section II. A.****

1. Complete the **Cover Page** in Appendix 1.
2. **Summary:** On a separate page from the main narrative, summarize your proposal in five sentences or less.
3. **Existing Program Services and Proposed Program Expansion/Enhancement Scoring: 45 points**
 - a. Please describe your existing FOC and Bridge services offerings. (10 Points)
 - i. How long your organization has been operating an FOC model, and how long you have been operating a Bridge program?
 - ii. The career pathway(s)/sector(s) into which your program facilitates entry, and the academic pathway that accompanies that career pathway. (Proposals should include a brief narrative overview of the career and academic pathway(s); include a graphic illustration of the pathway as an attachment to the proposal, per Appendix 2 of the RFP.)
 - b. Please describe your proposed innovation on your existing program. (25 Points)
 - i. Which innovation are you proposing under this application? If you select options #1 or #2, please complete **E.3.b.ii** below. If you select option #3, please complete **E.3.b.iii** below.
 1. adding new bridge modules including new industries or pathways. (Complete section ii. below)
 2. providing an additional bridge for career advancement further up the career ladder. (Complete section ii. below)
 3. innovating on existing bridge pathways (for example, adding a retention coach to focus on career advancement.) (Complete section iii. below)
 - ii. If you selected #1 or #2 on the above, please describe your selected pathway in detail and include more details on the following:
 1. Access to Public Benefits
 2. Financial Coaching
 3. Career Coaching
 4. Contextualized Adult Basic Education (the bridge)

- a. Proposed minimum entry criteria for bridge program participants (i.e., will there be a minimum reading and math level, or other testing criteria for eligibility)
 - b. Assessments (i.e., pre- and post-tests) that you propose to use to gauge participants' skill levels and the effectiveness of the bridge
 - c. When and where you propose to offer the bridge curriculum (what days a week, what time each day)
 - d. Whether your proposed bridge curriculum will be cohort-based or open enrollment; and if cohort-based the anticipated duration of the bridge course
 - 5. The overall training and career pathway
 - a. The career pathway(s)/sector(s) into which your program facilitates entry, and the academic pathway that accompanies that career pathway. (Proposals should include a brief narrative overview of the career and academic pathway(s); include a graphic illustration of the pathway as an attachment to the proposal, per Appendix 2 of the RFP.)
 - b. The rationale for choosing that pathway/sector, specifically: job demand and/or growth projections in your region for the chosen industry/sector; the extent to which the industry is accessible to and meets the needs of the population that you serve; and the potential for career growth and wage gains in that sector.
 - 6. Your organization's three-year plan for implementing and growing your bridge program(s)
- iii. If you selected #3 on the above, please describe your innovation in detail and include the following:
 - 1. How this innovation is different from current work.
 - 2. Describe how this innovation will affect clients, specifically how it will further move clients further up their career pathway and into financial stability.
 - 3. The overall training and career pathway
 - a. The career pathway(s)/sector(s) into which your program facilitates entry, and the academic pathway that accompanies that career pathway. (Proposals should include a brief narrative overview of the career and academic pathway(s); include a graphic illustration of the pathway as an attachment to the proposal, per Appendix 2 of the RFP.)
 - b. The rationale for choosing that pathway/sector, specifically: job demand and/or growth projections in your region for the chosen industry/sector; the extent to which the industry is accessible to and meets the needs of the population that you serve; and the potential for career growth and wage gains in that sector.
 - 4. Your organization's three-year plan for implementing and growing your bridge program(s)
- c. While not required, LISC strongly encourages that applicants incorporate financial products (for example, employer-sponsored small-dollar loans, lending circles, or credit-building

products like LISC Twin Accounts) into the program design. (LISC will award up to **5 extra points** to proposals that discuss the applicant's plan for integrating financial products into their program).

4. Target Neighborhood

Scoring: 2 points

- a. Identify the geographic location of the proposed services and the area served.
- b. Indicate whether your organization is located or working in a federally designated Opportunity Zone. LISC will award **up to 2 bonus points** to applicants located or working in an Opportunity Zone as defined by the Department of Treasury (<https://www.cdfifund.gov/Pages/Opportunity-Zones.aspx>).

5. Target Population

Scoring: 3 points

- a. Describe the population your organization currently serves.
- b. If different from the population your organization currently serves, describe the population you intend to serve through the expanded BCO services.
- c. Explain your outreach strategy for your existing bridge program; indicate whether you plan to continue using this outreach strategy for your proposed BCO program or what, if any, changes or additions you plan to make.
- d. Will this program serve a population of over 50% low- and moderate-income (LMI) individuals? Y/N Low and moderate income is defined as individual income that is less than 80% of the FFIEC-estimated Median Family Income. Give a specific description of how you determine the answer provided in the previous question.

6. Organizational History and Capacity

Scoring: 10 points

- a. Describe the organization implementing the Bridges to Career Opportunities initiative, with a particular focus on organizational capacity and experience. Cite examples of how the organization typically applies its skills and resources to accomplish its goals and satisfy its stakeholders' expectations.

7. Partnerships with the Workforce Development field

Scoring: 10 points

- a. Describe your current connections to or working relationships with workforce development collaboratives in your community/region. (Examples might include Chambers of Commerce, regional industry associations, National Fund for Workforce Solutions affiliates, etc.)
- b. Describe how you will leverage your relationships/connections with employers, workforce development agencies and training institutions to implement your proposed program.
- c. Do you have an industry advisory board that you consult in the design and modification of your bridge program? Please describe its purpose, structure/participants, and the type of input it provides.
- d. Describe your employer relationships, using examples that include: the name of the employer, industry sector, nature of the relationship (i.e., what kind of resources/services/advisement does the employer provide to your organization, and vice versa).
- e. Indicate whether your organization provides occupational skills training in-house or in conjunction with a skills training provider, such as a community college or a local workforce development board.

- f. Applicants must have at least one Memorandum of Understanding (MOU) in place with either an employer or a skills training provider; the MOU should address the employer or training entity's commitment to partner with your organization and specific roles that your organization and your partner will fill. MOUs do not need to be newly created and specific to this BCO grant proposal; existing MOUs with partners are acceptable.

8. Staff Qualifications

Scoring: 5 points

- a. Who will lead this program? What are the strengths, expertise and track record of your organization and the key individuals leading the program that will insure successful implementation? Please also include the industry experience of bridge instructors and skills training instructors.

9. Performance Indicators

Scoring: 15 points

- a. How many people do you serve each year through your existing bridge programs?
- b. What is your approximate "bundling rate" for integrated services delivery? (i.e., the percentage of individuals receiving all or almost all of the core services)
- c. What is your approximate completion rate for your existing bridge program?
- d. How many do you anticipate will complete the skills training component?
- e. **Complete the Performance Indicator chart in Appendix 2 per the following instructions:**
 - i. Please complete the chart in Appendix 2 and provide narrative and data in text form as well. Note that the Performance Outcomes chart should include outcomes from the most recent 12-month period that you have for your existing program *and* the outcomes that you propose to achieve in Years 1-3 of your Bridges to Career Opportunity program, if awarded a grant.
 - ii. Category 1 and 2 applicants are all required to complete the same Performance Outcomes chart. It is expected that Category 2 applicants will have prior-year data pertaining to a bridge program. Please enter "n/a" for any prior-year outcomes that you do not have available; however, be sure to project Year 1-3 goals for *all* of the outcomes in the Performance Outcomes chart.

10. Budget

Scoring: 10 points

- a. Please review and use Appendix 3 as a guide in the development of the budget.
- b. Please provide a narrative of the expenses.

F. TECHNICAL REQUIREMENTS

1. Requirements for Proposal Narrative

Please submit a proposal narrative of no more than 10 single-spaced pages (excluding the cover page). The proposal narrative *must* include page numbers.

Narrative sections and headings should be labeled according to the outline provided in the RFP. (For example, "1. Confirmation of Applicant Category," "2. Proposal Summary," "3. Existing Program Services and Proposed Program Expansion/Enhancement," and so on. It is not necessary to create subheadings for the questions labeled a., b., c, etc. and i., ii., iii., etc.)

2. Required Attachments and Requested Order of Documents

Please order your proposal packet into a single PDF attachment as follows:

- Cover sheet (see Appendix 1 of the RFP)
- Proposal summary
- Proposal Narrative (10 single-spaced pages or less, with page numbers)
- Performance measurements charts (see Appendix 2 of the RFP)
- Budget and budget narrative plan (see Appendix 3 of the RFP)
- A graphic depicting the career pathway(s) and the academic pathway(s) for the bridge program(s) that you are proposing to support with the grant funds (see Appendix 4 of the RFP)
- Copy of most recent audit (within past two years)
- List of current board members and affiliations
- Memorandum of Understanding between employer(s) and/or training provider(s)

G. SUBMISSION DATE

Proposals will be accepted electronically until **Wednesday, September 12** at 4:00 PM local time in the city in which your LISC office is located. Applicants will be notified of results by January 2019.

Please submit proposals, **with all attachments as a single scanned file**, by electronic mail to **the LISC local office contact in your city/region**.

Appendix 1: Cover Page

Organization			
Mailing address			
City, State, Zip			
Street address <i>(if different from mailing address)</i>			
Phone		Fax	
Website			
Primary Contact for this Proposal:			
Name			
Title			
Phone		Fax	
Email			
Mailing address <i>(if different from organization)</i>			
City, State, Zip			
Category of Application (Category 1: FOC or Rural only; Category 2: FOC and Existing BCO site)			

Appendix 2: Performance Measurements

Please fill out the following tables for as many bridge programs as you have or intend to offer through this grant.

All applicants must complete the Overview of Bridge & Skills Training Initiative chart.

Please complete a separate Overview chart for each bridge program that you already offer *and/or* that you are proposing to offer with grant funds; be sure to distinguish which bridge programs are existing and which are to-be-developed/implemented under the grant.

Bridge & Skills Training Information Table	
Target Sector & Career Pathway - Please select a cluster from the dropdown and then provide additional information in the second cell.	
Industry-Recognized Credential(s) Available to Training Participants	
Time Period Bridge Offered or expected to be offered (should be date range or starting date)	
Length of Bridge Programming – in weeks	
Bridge given concurrently to occupational skills (Y/N)	
Length of Occupational Skills program if not offered concurrently.	
Occupational Provider name	
Number of Bridge Cohorts per Year	
Number of Occupational Skills trainings offered per year	
Size of Bridge Cohort	
Source of Bridge Curriculum Used	

All applicants must complete the Performance Measurements chart on the following page. Category 1 applicants should only complete the proposed outcomes and Category 2 must complete the proposed outcomes and the actual outcomes from 2017.

	Actual 2017	Proposed Year 1	Proposed Year 2	Proposed Year 3
<i>Training Outcomes</i>				
# of participants participating in employability skills training				
# of participants beginning a bridge program				
# of bridge program completers beginning occupational skills training				
# of bridge program completers completing occupational skills training				
# of participants beginning occupational skills training				
# of participants completing occupational skills training				
# of individuals who attain an industry-recognized credential				
# of training participants placed in jobs (overall; including those who obtained employment outside of the targeted career pathway.)				
# of training participants placed in jobs in the targeted career pathway only				
Average starting wage at initial post-training placement				
Average most recent wage of training graduates (wage advancement)				
<i>Financial Stability Outcomes</i>				
# of participants served with net income increases				
# of participants served with net worth increases				
# of participants served with credit score increases				

Appendix 3: Budget

Please attach a detailed line item revenue and spending plan, using the sample budget template below. Note the following:

1. Assume a 12-month budget from January 1, 2019-December 31, 2019. Category 1 applicants should apply for a budget of \$95,000. Category 2 applicants should apply for a budget of \$85,000.
2. Funding can be used in the following ways:
 - a. Salary and Fringe for staff involved in the Bridges to Career Opportunities program including the program director, career coach, instructors teaching adult education or vocational training, financial coach, income supports counselor/intake staff and/or job developer.
 - b. Travel for staff to attend trainings or mileage costs to support program implementation.
 - c. Program delivery-related costs such as curriculum development or supports for clients to complete the bridge programming and continue on career.
 - d. Program-related operations cost such as rent for the associated square footage, phones, computer services, etc.
3. All sites are required to send a program manager and one to two other key staff people to a national convening that will help sites understand the Bridges to Career Opportunities model development.
4. For sites that do not have a system for pulling credit reports/credit scores on a consistent basis, please add \$1,500 to your budget to cover these expenses.

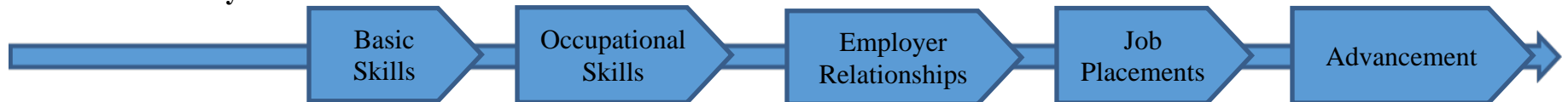
BUDGET	Amount Requested from LISC
<u>LISC total request for funding</u>	
TOTAL BUDGET	
EXPENSES	Amount Requested from LISC
Salaries & Benefits Please list staff titles here:	
Travel	
Supplies	
Consultants	
Program Costs	
Other Direct Costs	
TOTAL EXPENSES	

Appendix 4: Pathways

Please complete the chart below for each of the Career Pathways proposed in the application. Feel free to exceed 1 page and add additional columns/rows in order to best describe your bridge and Career Pathways program(s). Note that Bridges may occur at multiple points in an individual’s career path

Organization Name:

Career Pathway Name:



	Bridge (i.e. Basic/Academic Skills/Soft Skills)	Technical Training (i.e. Vocational/Occupational/ Technical Skills training)	Employer Engagement (What employers are engaged and in what ways?)	Job Placements (What type of job is the target of the program? What wage level is anticipated?)	Advancements/Additional Training (What opportunities are there for advancement and what additional training is needed?)
Description of Training Provided					
Length of Training – Include start and end dates as well as daily hours.					
Location and Annual Frequency					
Credits and/or Credentials Participants Will Earn					
Requirements to Complete/Move to Next Level					
When FOC/supportive services are provided					
Follow-up parameters for clients in the bridge (in what interval and by whom)?					