

Requests for Proposals: Advancing Equitable Wealth Policy

RFP Release Date:	May 11, 2023
LOI Information Sessions:	May 18, 2023, May 25, 2023
LOI Deadline:	June 1, 2023 at 11:59 p.m.
LOI Decisions:	June 16, 2023
Full Application Info Sessions	June 22, 2023, June 29 2023
Full Application Deadline:	July 17, 2023 at 11:59 p.m.
Site Visits:	July 24 – July 28, 2023
Funding Decisions:	August 18, 2023
Announcements:	August 25, 2023

Background:

The Chicago Community Trust launched the Coalitions for Equity in Wealth Policy funding strategy in 2020. Just as the first Request for Proposals (RFP) was being released, the COVID-19 pandemic took hold and the existing economic disparities in communities of color the Trust intended to address through this funding strategy were laid bare and deepened as a result. The pandemic dramatically shifted the policy climate in the city, county, state, and country. It continues to challenge us all to address the profound and acute impact of the health, economic, and racial justice crises most felt by vulnerable residents while seizing the opportunities for structural change that growing awareness and demands for action provide.

Over the last few years, the Trust-supported coalitions and the organizations that comprise them were able to achieve significant progress and build momentum toward policies and systems changes that will begin to chip away at the racial and ethnic wealth gap in Chicago and Illinois. In some issue areas, these organizations and coalitions have been doing foundational work like researching and documenting systemic barriers, identifying community-led solutions, and building public will and momentum toward change. In other cases, we've seen legislative victories such as the passage of the Predatory Lending Prevention Act, the increase and expansion of the Illinois Earned Income Credit, the Illinois Community Reinvestment Act, and the City of Chicago's Connected Communities Ordinance.

The 2023 Advancing Equitable Wealth Policy funding opportunity is intended to support both individual organizations and coalitions that are creating the conditions to advance meaningful policy reforms. The Trust recognizes that membership in coalitions takes several forms and that the success of coalitions depends upon the relative strength and effective engagement of the contributing partners toward the achievement of a broader set of policy outcomes. The Trust defines membership in this context as an organization's ongoing investment of time, energy, and resources to advance the coalition's goals, codified through formal membership in said coalition.

The Trust seeks to fund the work of coalitions and their members by supporting organizations that serve in various roles, such as coalition chairs or co-chairs, community organizers, researchers, legislative advocacy, and communications partners. The Trust assesses applicants and determines funding levels based on each organization's role in the coalition(s). For more information, see below.

Need/Opportunity Statement:

To flourish, the Chicago region must be a place where all current and future residents can thrive. The Trust is committed to closing the racial and ethnic wealth gap in the Chicago region by increasing the share of economic prosperity for Black and Latinx individuals and households and their communities. The Trust believes that only by addressing our significant wealth and economic disparities can we achieve our vision of a thriving, equitable, and connected region.

Longstanding discriminatory policies and practices have propelled racial segregation, stripped wealth from people and communities of color, and hindered their ability to create wealth. Though many such federal policies have been abolished, their scars are still visible in the Chicago region's troubling history of prejudicial practices and inequitable access to economic opportunity for people of color. [Nationally, white families have nearly 10 times the wealth to invest in their own and their children's future than Black families.](#) In [Chicago, this gap may be larger, given the long history of wealth stripping in the region. An issue as complex and entrenched as the wealth gap cannot be solved through any single solution, but rather a variety of policy and structural changes. Accordingly, household and community-scale wealth building require solutions aimed at addressing these structures and systems.](#)

The Trust aims to support efforts to **advance and protect corrective policies and systems reforms** that address inequities in wealth creation for Black, Latinx, and other racial and ethnic populations negatively impacted by discriminatory and racist policies and practices. We aim to advance policy change at the individual, household, and neighborhood levels.

In 2023, the Trust is conducting an Open RFP process for Advancing Equitable Wealth Policy. Any organization, including those funded in previous years, is welcome and encouraged to apply. Each submission will be judged on its ability to articulate an effective plan to address the priority strategies listed below.

Goals and Outcomes:

The Trust is committed to achieving its long-term goals and outcomes and investing in organizations and efforts that contribute to achieving them. Based on the last three years of grantmaking and refinement of our approach, we have selected the following outcomes that will inform progress toward our shared mission. The grant applicant's outcomes should be informed by how the proposed project or strategy will lead to the anticipated result or long-term change (i.e., your theory of change). Grant applicants will be asked to select and report on the outcomes from the list below that are most relevant and related to their role and contributions to the coalitions and policy efforts for which they are applying:

- **Amplify Impact Following Policy Wins:** Highlights how the policy wins have altered the lives of constituents or communities and ensures equitable implementation.
- **Build Knowledge and Narrative:** Documents the organization's ability to deepen knowledge development among stakeholders on key issues and initiatives.
- **Build Public & Political Will:** Describes the activities an organization undertakes to build external support among political audiences and the general public.
- **Escalate Awareness/Salience of Issues:** Documents an organization's or coalition's efforts to raise the importance of an issue with key audiences and stakeholders.

- **Increase Coalition, Constituent and Organizational Power:** Details the change in constituent strength of voice, and the organization's or the coalition's influence among key audiences.

Measures of Progress

Applicants must select and report on the outcomes that best capture the role their organization is most directly contributing to the coalition(s) or policy effort and select clear Measures of Progress (MOPs).

MOPs provide measurable and reportable evidence that a proposed project or organization has effectively achieved – or is on the path to achieving - its objectives. These are what can be measured during the term of the grant period and contribute to the applicant's longer-term outcomes.

During the grant period, we expect that grant recipients will report on MOPs that assess both the grant recipient's own contributions to the coalition's success, strength, and health, as well as the policy change progress for which the coalition is advocating.

The Trust Learning and Impact team is happy to support applicants as they work to identify appropriate measures and will provide information on best practices at an information session. (Dates provided above.)

Priority Strategies and Activities:

The Trust is interested in supporting organizations and coalitions engaged in the following priority policy areas:

1. Individual Economic Security
2. Access to Capital
3. Neighborhood Investment and Stability
4. Workforce Development and Worker Protection
5. Equitable Tax and Budgeting Systems
6. Civic Power and Representation

1. Individual Economic Security

The nation is experiencing growing income inequity, and the Chicago region is no different. The Trust recognizes income growth and financial well-being as being critical driving forces of racial equity in our city and region. *The Trust will consider funding for efforts that seek to do the following:*

- *Reform and expand efforts to support stable, living wage incomes and cash transfers for families.*
- *Set stronger wage, labor, and family and medical leave standards.*
- *Improve postsecondary education affordability and decrease student loan burden.*
- *Enable the retention and growth of savings*

2. Access to Capital

The Trust recognizes that supporting the growth of wealth for low and moderate-income families requires complementary efforts to invest in the community assets that make for economically vibrant neighborhoods. The Trust recognizes that reforms that can strengthen access to capital and direct public funds to attract private capital into disinvested communities are critical to community wealth-building opportunities. *The Trust will consider funding for efforts that seek to do the following:*

- *Increase the availability of capital for small businesses and community development.*
- *Improve real estate development outcomes for community developers, including how capital flows into and is absorbed in underinvested communities.*
- *Advance major infrastructure projects that will catalyze change in communities.*

3. Neighborhood Investment and Stability

The generation of household wealth for Black and Latinx communities is directly tied to the fabric of neighborhoods. The conditions of neighborhoods can affect everything from property values and economic mobility to access to quality jobs and safety, therefore neighborhoods that thrive lead to households that thrive. To achieve this investment, neighborhoods must provide access to services that many take for granted—grocery stores, parks, transit systems, restaurants, and more, all working together to create stability and economic opportunity. *The Trust will consider funding for efforts that seek to do the following:*

- *Restore vacant land and abandoned buildings to productive use.*
- *Make commercial or mixed-use corridors more vibrant, such as reducing property vacancy and increasing improvements to the built environment that make our communities safer.*
- *Integrate transit and land use to increase transit ridership, improve community walkability, and promote business development.*
- *Reform land use to accommodate broader societal changes, such as the changing nature of retail, technology as a decision-making tool, remote working, the future of work, and so on.*

4. Workforce Development and Worker Protection

Supporting the dignity of work for low and moderate-income families requires reforms that foster and strengthen quality employment opportunities and prevent employers from implementing policies that negatively impact an individual's ability to earn a living wage. *The Trust will consider funding for efforts that seek to do the following:*

- *Reform and expand efforts to create jobs that offer stable, living wage that supports savings.*
- *Identify quality employment opportunities and improve retention and development of individuals in quality jobs.*
- *Increase public funding to support barrier reduction strategies for students and increase postsecondary completion and employment access and retention, particularly in high-growth sectors.*

5. Equitable Tax and Budgeting Systems

Inequitable and antiquated tax codes and budgeting practices have far-reaching implications on the well-being of communities across the city, county, and state. Chicago's residents are entitled to fair and transparent practices that provide avenues for individuals and communities to thrive. *The Trust will consider funding for efforts that seek to do the following:*

- *Increase transparency in government budgeting.*
- *Conduct racial equity impact assessments in policy analyses and proposals.*
- *Bring greater equity to the tax code.*

6. Civic Power and Representation

Our communities will be stronger when residents can tell their own stories and have their voices included in the decision-making that impacts their lives. Chicago and Cook County can only thrive when the fundamental democratic rights of its citizens are protected. *The Trust will consider funding for efforts that seek to do the following:*

- *Advocate for fair representation and redistricting practices at the local and state level.*
- *Improve government effectiveness and transparency reforms.*
- *Advance community organizing efforts and base-building around specific policy issues.*

Grantmaking Criteria:

Effectively advancing policy reforms and systems change requires an intentional combination of constituent organizing, communications, policy development, cross-sector and bipartisan legislative outreach, advocacy, research, and coalition building. Recognizing that all of these components are critical to any successful policy reform effort, this funding opportunity is flexible to accommodate the specific roles of individual applicants and the needs of the coalitions in which they are engaged.

The Trust will consider the following:

- Organization's contributions to the coalition's success
- Commitment of time and effort
- Contribution of critical functions, such as constituent and legislative outreach, research, and communications
- Engagement of those most impacted by the policy or systems to be reformed

As before, the Trust recognizes that some organizations are engaged in multiple coalitions across the **RFP Policy Priorities** listed above. Trust reviewers will take this into account when scoring applications and determining funding levels.

Competitive applications will clearly articulate the following:

- The impact of the proposed policy or structural change through a racial equity lens. This entails demonstrating a firm understanding of the historical context of the policy environment, incorporating research that disaggregates data by race and other socioeconomic factors, engaging, building and earning trust, and co-developing policy approaches with those most directly impacted, centering their voices within advocacy efforts.
- The coalitions in which they participate and their related policy goals.
- Their own role within the coalition.
- The organization or coalition's track record of advancing policy change.
- A demonstrated track record of engaging in and contributing to effective partnerships and collaborations.

- Preference will be given to organizations and coalitions that are working to advance policies that are in alignment with the Trust's shared policy agenda.

In summary, competitive applicants will clearly articulate their role in advancing policy or systems change independently or as part of a coalition, as well as the value they provide to the ecosystem of organizations, leaders, and advocates working on the identified issue(s). The Trust will evaluate an organization's track record of working collaboratively, sustaining partnerships, and serving a clear and defined role within the coalition(s).

The 2023 Advancing for Equitable Wealth Policy funding opportunity is the third year of a grant opportunity initiated in 2021. Previous grant recipients are encouraged to apply to this funding program. However, previous funding does not guarantee an award for this year.

The Chicago Community Trust will provide up to 25 grant recipients from 2023 Advancing Equitable Wealth Policy grant cycle for between \$25,000 and \$150,000.

General Operating and Project-Specific Grants: Both General Operating and Project-Specific Grants are available through this RFP. The Trust assumes that given the objectives and activities supported throughout this RFP, there will be instances where general operations support is more appropriate and others where project-specific support is more appropriate.

For applicants requesting support for coalition work, please select Project Support as the type of funding being requested.

For applicants requesting support for individual policy efforts (i.e., those for which they are primarily responsible) may submit a request for General Operating or Project Support.

For applicants requesting support for legislative advocacy or lobbying activity, the applicant must submit a request for Project Support. The Trust will consider supporting legislative and lobbying efforts at the city, county, state, and in some cases federal level around specific issues if it is clearly described within the application and is in alignment with the Trust's priority policy agenda. The Trust will work with each applicant to identify the proposal's scope, including whether Trust grant funds can be used for the lobbying activity described in the application.

The Trust retains the discretion to make the ultimate determination between a general operating and project-specific grant award based on the following factors:

1. **Existing general operating support grant recipient:** If the organization is receiving general operating support from the Trust and is currently within the term of that grant, we will only consider a project-specific grant as we limit grant recipients to one general operating grant per year.
2. **The organization's core mission and work:** Applicants that are policy advocacy organizations at their core will be considered for general operating grants. Organizations that are supporting change but whose core mission and work fall outside of regular policy advocacy will be more likely considered for project-specific grants.
3. **Policy alignment:** If the organization is requesting project-specific support for a particular policy effort, the Trust will make the determination based on alignment with the Trust's policy agenda (see Appendix). Depending on the type of activities supported by a

grant, this kind of support may also require the Trust to report it as part of the Trust's own lobbying activity under its 501(c)(3) status.

Eligible Applicants:

To be eligible for a grant award, an applicant must be:

- A nonprofit organization with evidence that it (a) has been recognized by the Internal Revenue Service as an organization described in Section 501(c)(3) of the Code; (b) is fiscally sponsored by a Section 501(c)(3) organization; (c) or is a governmental unit within the meaning of Section 170(c)(1) of the Code;
- Described in Section 170(b)(1)(A) of the Code, other than a “disqualified supporting organization” within the meaning of Section 4966(d)(4) of the Code; and
- Located within and/or primarily serving residents of Cook County, Illinois.

Sponsored organizations without 501(c)(3) status must identify their fiscal sponsor as soon as possible and ask them to complete an organization profile in The Chicago Community Trust's grants management system, GrantCentral, at <https://community-cct.force.com/grantcentral/s/> prior to the sponsored organization's application submission.

Ineligible Uses:

- Applicants that do not meet the Eligible Applicants requirements outlined above
- Capital campaigns or endowments
- Inherently religious activities

Evaluation and Learning:

Sharing successes or challenges in achieving measures of progress is critical to our collective learning, decision-making, and impact.

The Trust is committed to achieving our long-term goals and outcomes. We are developing outcome measures both internally and with our partners that inform progress toward our shared mission. Your project outcomes should be informed by why you think the project or strategy will lead to the anticipated result or long-term change (i.e., your theory of change). After you identify those outcomes, develop specific, time-limited measures of progress. For shorter-term grants (one-year), these outcomes may not be achieved during the duration of the project. Measures of Progress provide measurable and reportable evidence that a proposed project or organization has effectively achieved – or is on the path to achieving – its objectives. These are what can be measured during the term of the grant period, contribute to your longer-term outcomes, and are aligned to the Trust's strategic priorities. We also recognize that there could be challenges to the implementation of any grant, many of which are not under the grant recipient's control, that may prevent you from achieving your targets. Learning with you about the progress made towards your outcomes and measures is part of the Trust's evaluation and learning efforts.

For potential grant recipients for whom developing metrics or work plans is a new activity or for those individuals who would like to learn more about developing Measures of Progress, the Trust will be providing webinars, in-person sessions, and opportunities for ongoing peer learning. Further details on schedules and registration may be found at <https://community-cct.force.com/grantcentral/s/>.

Collection of Diversity, Equity, and Inclusion Demographic Data:

The Trust asks that grant seekers provide demographic data on board and staff as well as clients or beneficiaries of programs and services. The Trust believes the board and staff composition of grant recipients should be inclusive and reflect the diversity of the demographics of the region and the individuals they serve. Diversity for the Trust encompasses but is not limited to ethnicity, race, gender, sexual orientation and identification, age, economic circumstance, class, disability, geography, and philosophy. For this reason, the Trust does take into consideration the demographic makeup of the board, staff, and clients of a grant applicant as an important proposal evaluation criterion.

Application Process:

The application process has two steps: a letter of inquiry (LOI) phase and a full application phase. Only select LOI applicants will be invited to the full application phase. All LOI applicants will be notified whether they will be invited to the full application phase, and invited applicants will be given ample time to complete the full application.

Applicants must complete the application process via GrantCentral, The Chicago Community Trust's online grants management system. To access an application, grant seekers must log into GrantCentral at <https://community-cct.force.com/grantcentral/s/>.

Applicants must complete an Organization Profile. If the Organization Profile was completed for a previous funding opportunity, it must be reviewed and, if needed, updated and certified prior to application submission.

Sponsored organizations without 501(c)(3) status must identify their fiscal sponsor as soon as possible and ask them to complete an organization profile in GrantCentral prior to the sponsored organization's application submission. Fiscal sponsors must log in and complete and certify an organization profile in GrantCentral at <https://community-cct.force.com/grantcentral/s/login/> prior to application submission.

Submission Deadlines and Other Key Dates:

- The LOI Application deadline is June 1, 2023.
- The Full RFP Application deadline is July 17, 2023.
- Applicants will be informed of their LOI advancing to the full application phase on June 15, 2023.
- Site visits will be conducted by the review committee the week of July 25, 2023.
- Funding decisions will be made by mid-August.
- Applicants will be notified of awards by August 25. Applicants who were invited to submit a Full Application but are not chosen for funding also will be notified at this time.

Contact Information:

For technical questions regarding GrantCentral, email grants@cct.org.

For programmatic and application content questions, email Matt Shomo at mshomo@cct.org.

Appendix/Additional Documents:

Trust Policy Agenda:

CCT FY23 Policy Agenda by 10 Year Strategic Goals

Increase Black and Latinx Household wealth relative to white households by increasing assets and reducing debts

- Ensure access to fair and affordable **homeownership** including eliminating systemic racism in the housing finance system and appraisal process; implementation of IL Community Reinvestment Act
- Advocate changes to state **workforce** system structure and advance procurement reforms to incentivize quality jobs and employment

Increase community-directed flow of public, private & philanthropic capital in disinvested Black & Latinx communities

- Advocate for implementation of **federal funds for COVID recovery** that ensure resources reach Black and Latinx individuals, small business and communities hardest hit and that lead to transformation of programs and systems to be more equitable
- Secure **vacant, abandoned and tax delinquent properties** as community assets in Black and Latinx communities by advocating reforms to the annual tax and scavenger sale processes and removing any perverse property tax incentives for store front vacancies
- Implementation of **Connected Communities** ordinance and advocate using city/state/federal resources for ETOD projects on S/W sides.

Increase and enhance community member participation in civic action

- Support the adoption of proposed, community-engaged comprehensive plan, **We Will Chicago**
- Enhancing **public safety** through policing and criminal justice reforms

Increase number of households meeting basic human needs

- Implementation of State **Earned Income Tax Credit** expansion; advocate creation of a state **Child Tax Credit**; expand refundable federal child tax credit
- Support policies and systems reforms that enhance **rental housing affordability and stability** as an important pathway to homeownership, platform for economic mobility, community safety and well-being including

Increase philanthropic giving aligned with Trust strategic priorities

- Defend against proposed reforms to **Donor Advised Funds** that would undermine the Trust's ability to help channel philanthropic giving to communities (e.g., The Accelerating Charitable Efforts Act)