

# **THE PHYLLIS MARGOLIUS FAMILY FOUNDATION**

## **PROGRAM IDEA CHALLENGE GRANT**

**REQUEST FOR PROPOSALS**

**ISSUED NOVEMBER 15, 2017**

**[www.phyllismargolius.org](http://www.phyllismargolius.org)**

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## 1.0 THE PHYLLIS MARGOLIUS FAMILY FOUNDATION

The Phyllis Margolius Family Foundation (the Foundation) was created in 2014 in memory of Mrs. Phyllis Ann Goldman Margolius, following her untimely death from a rare form of aggressive cancer. In establishing the Foundation, her husband and children wished to honor her as well as to continue her spirit of philanthropy, her lifelong commitment to the greater Washington DC metropolitan Jewish community, and her dedication to Tikkun Olam (Repairing the World).

Phyllis' values were demonstrated through her actions. She served in volunteer capacities in the community, tirelessly supported and cared for her friends and family, and instilled the principles of honorable living in her children and grandchildren. Phyllis was grateful to have the ability to give money in hopes of making a difference in the community and the lives of those who would benefit from a helping hand. The Foundation's vision is inspired by Phyllis' legacy of compassion and integrity. The family is guided by Phyllis' own words in their approach toward philanthropy:

- (1) "Take a flyer on new or unproven initiatives"
- (2) "Give to programs which are meaningful"
- (3) "Make a difference"
- (4) "Work together as a family"

with the ultimate goal of addressing *big* and *difficult* and what seemed to be unsolvable problems in our community.

Motivated by Phyllis' ability to enrich and unite the community by solving problems and fulfilling unmet needs, the Foundation developed the concept of a Program Idea Challenge. This grant is intended to encourage collaboration between organizations in the development of creative programs that serve the Jewish community.

### MISSION STATEMENT

The Phyllis Margolius Family Foundation is committed to investing in people, programs, organizations and ideas to strengthen the greater Washington, DC Jewish and non-Jewish community and Israel.

The Foundation makes grants to local Jewish and non-Jewish charitable causes in the Washington DC community and actively seeks opportunities to leverage foundation resources through partnerships with other foundations and non-profit organizations. The Foundation provides resources to encourage participation by members of the local Jewish Community in multiple Jewish organizations and activities; and provides funds for Washington-based programs that support the State of Israel.

Within these areas, the Foundation pursues its mission by:

- *Helping organizations that support active hands on assistance to and enrichment of metropolitan Washington DC area Jewish and non-Jewish residents;*
- *Providing resources to fund programs that will address the high costs of being an active member in the Washington, DC Jewish community, such as the enormous costs of belonging to or participating in more than one of the following: Jewish day schools and after school programs, synagogues, Jewish community centers, Jewish youth groups, Jewish day and overnight camps, and adult Jewish learning;*
- *Identifying and assisting organizations to be inclusive to interfaith families within the local Jewish community;*
- *Funding programs that will involve members of the Jewish community in the needs of the less fortunate in the Washington DC metropolitan community; and,*
- *Supporting programs connecting the Washington DC Jewish community to Israel.*

For additional information about The Phyllis Margolius Family Foundation, please visit [www.phyllismargolius.org](http://www.phyllismargolius.org).

## 2.0 THE PROGRAM IDEA CHALLENGE GRANT

The purpose of this Request for Proposals (RFP) is to solicit innovative program ideas for collaboration with one or more Jewish and other organizations to foster, enrich, and maintain Jewish identity and participation for young Jewish families primarily in the Washington metropolitan area.

The population to be served through this grant award is Jewish or interfaith families with young children, where at least one parent identifies as Jewish. The Foundation is seeking creative ideas ("Idea Challenge") for programs that will engage participants in the Jewish community and that will eliminate or reduce barriers to meaningful participation. We are looking for original and new ideas that can be implemented into program(s) for young Jewish families. The winner of the Grand Slam award will be expected to carry out the idea through programming with their collaborative partners (or through other partners selected by the Foundation best suited to carry out the idea). Winners of runner-up awards are eligible to receive awards for their creative ideas, but will not be required to implement their proposed program.

### 2.1 Background

In February 2017, The Phyllis Margolius Foundation in collaboration with The Jewish Federation of Greater Washington conducted a survey of young Jewish families in the Washington DC metropolitan area. The Foundation and its partners anticipated that there are Jewish families with young children who are currently not engaged with the Jewish community and who may desire to be more involved, but face challenges to participation. The survey was designed to answer two major questions:

1. What are the barriers to Jewish participation for young Jewish families?
2. What can the organized Jewish community do to help eliminate or reduce the barriers?

The outcome report, *Family Participation in Jewish Institutions Research Project*, identified several major barriers. Most participants indicated that the availability of activities for children was the primary factor for participation. The other major barriers included costs, culture/fit/atmosphere, location, and time constraints. To a lesser extent, knowledge of available programs was perceived as a barrier to participation.

As a result of the survey outcomes, the Foundation's Board of Directors committed to funding a Program Idea Challenge Grant. The Foundation is seeking innovative ideas that will engage and embrace members of the Jewish community by providing programs that:

- Are relevant to the needs and interests of young families;
- Are cost-effective for participants;
- Demonstrate strong partnerships between or among collaborating organizations;
- Can be replicated in other communities; and,
- Demonstrate a plan for sustainability after the grant period.

The Foundation is interested in exploring creative ideas and is not limiting the type of program to be proposed.

For an in-depth review of the complete survey, along with the survey results and a synopsis, please refer to **Attachment B**.

## **2.2 Grant Period**

The grant period will begin June 1, 2018 and will consist of three program years:

- June 1, 2018 – May 31, 2019
- June 1, 2019 – May 31, 2020
- June 1, 2020 – May 31, 2021

## **2.3 Grant Award**

Phyllis was a baseball fan and a Washington Nationals baseball fanatic. Therefore, in that tradition, grants may be awarded as follows:

- A *Single*. A one year, one time award of \$5,000.
- A *Double*. A one year, one time award of \$10,000.
- The *Grand Slam-Home Run*. One award of \$120,000 payable in three annual installments of \$40,000 for each program year, to be used toward implementation and operation of the program presented.

## **2.4 Minimum Required Qualifications**

To be considered for a grant award, proposers must meet the following minimum requirements:

- Proposals must reflect a collaborative effort between at least two organizations. Additional collaborations are encouraged, as are collaborations across disciplines. One organization must be designated as the lead organization, and as such, will submit the proposal. All collaborators must be listed on the Letter of Intent and described in the proposal. An organization can serve in more than one capacity for minimum required qualifications as long as there are at least two collaborating organizations.
- At least one entity must be a Jewish organization serving community needs.
- At least one organization must be a Jewish organization serving interfaith and/or Jewish constituents.
- All organizations within a collaboration must have IRS designations as public charities.
- At least one of the collaborating organizations (preferably the lead organization) must be based in the Washington, DC metropolitan area.

## **2.5 Terms and Conditions**

The following terms and conditions apply to this solicitation and to any proposals received in response.

1. **Agreement.** A contract that results from this proposal indicates an agreement by the collaborating organizations that they will perform the services proposed during the time frames established in **Section 2.2**.
2. **Payment.** The grant award for the first year will be released by June 1, 2018. For the following two years, the Grand Slam-Home Run awards will be released within two weeks of receipt of the prior year's report (see **Section 2.8** for reporting requirements).
3. **Proposal Evaluation.** During the evaluation period, the Foundation reserves the right to review the proposal, as well as other publicly available information, such as organizations' websites, social media, GuideStar profile, and other sources, to assist in evaluation of the proposers' qualifications. Proposing organizations may be asked for additional clarifying information during

the evaluation process (see **Section 2.7**). Proposers may be deemed non-responsive if the requested information is not provided.

4. **Cancellation.** The Foundation reserves the right to cancel this solicitation at any time.
5. **Award Conditions.** If no proposals are deemed to meet the Foundation's requirements, the Foundation reserves the right to make no awards or to reduce the award amounts.
6. **Key Personnel.** Proposing organizations must provide the names and resumes of proposed key personnel (see instructions in **Attachment A**). Any changes to key personnel after proposal submission must be requested in writing, with resumes of proposed replacements. Changes must be approved by the Foundation. During the grant period, the Foundation may also request changes to key personnel, if it is deemed that key personnel performance is negatively impacting the program.
7. **Confidentiality.** Proposing organizations agree to maintain confidentiality and security of any personal or financial data received from program participants.
8. **Continuous Program Improvement and Program Changes.** During the course of the grant period, it is anticipated that program enhancements may occur. The proposing organizations agree to provide, in writing, any proposed changes that significantly differ from the original proposed services, with rationale and supporting documentation. The Foundation must receive these proposed changes thirty (30) days prior to implementation of the proposed change, and the Foundation reserves the right to approve or disapprove of the requested change.
9. **Lead Organization.** The lead organization accepts responsibility for the performance of its organization, as well as its collaborating organizations.
10. **Intellectual Property.** By submitting a proposal, the proposing organizations agree that the programs or ideas presented may be used by the Foundation as it deems suitable even if no contract award is made. For example, the Foundation may wish to adapt a program model for another population. If a proposal contains proprietary information, this information should be marked as follows.

"The following information is proprietary and may not be used without written consent of our organization." <Insert proprietary information.> "End of proprietary information."

Please note that an entire proposal cannot be designated as proprietary.

11. **Costs of Proposal Preparation.** Any costs incurred in the preparation of proposals are the responsibility of the proposing organizations and will not be reimbursed by the Foundation.
12. **Multiple Proposals.** Organizations may submit multiple proposals for consideration; however, each proposal must be a complete package, i.e., each proposal must contain complete responses and all required attachments. Proposals that refer to other submissions for required materials will not be considered.
13. **Termination.** At any time, in the sole and absolute discretion of the Foundation, should any organization who is a recipient of award funds from this RFP, not be complying with the spirit of and/or the terms or conditions of the grant award agreement or if the organizations are not using the funds to carry out the program(s) as intended by the Foundation, then the Foundation may without any notice, terminate any and all remaining grant fund payments to the organizations under this RFP and under any grant award agreement. At the conclusion of each grant year of the Grand Slam Award, the Foundation reserves the right not to renew future funding if the terms and conditions are not met.
14. **Use of Funds.** All Grand Slam funds shall be required to be used towards the implementation and operation of the program challenge grant project, or as otherwise approved by the Foundation.

Recipients of runner-up awards shall not be required to implement or operate their proposed programs. Awards to runners-up are in recognition of the quality of their ideas, and the funds may be used as desired by the recipients.

## ***2.6 Program Requirements***

In addition to the minimum qualifications identified in **Section 2.4**, proposed programs must meet the requirements listed below. The Foundation seeks innovative, creative ideas and is not limiting the type or the content of the program to be offered, if the program can successfully meet requirements.

### ***2.6.1. Evidence-based Programming***

If the program is based on a similar program from another community, then please provide and demonstrate the capacity for success based on research, past outcomes for similar programs/populations, or other objective measures.

### ***2.6.2. Effective Collaborations***

The program must maximize collaborations between organizations to make effective use of each organization's strengths and reach into the community. A minimum of two organizations (one lead and one collaborator) is required. Additional collaborators are highly encouraged.

### ***2.6.3. Cost-Effective Services***

The program should be cost-effective in three areas:

1. Fees for participants should be reasonable to encourage participation.
2. Cost per participant subsidized by the Grant offers the opportunity for the maximum number of participants to be served or the costs of the program, subsidized by the Grant, offers the opportunity for the program to be optimally effective.
3. The program is sustainable after the grant period ends.

### ***2.6.4. Reduction or Elimination of Barriers***

The program design must include strategies for recognizing, reducing, and eliminating barriers to participation (please refer to **Attachment B**).

### ***2.6.5. Recruitment and Retention***

The program must have recruitment and retention plans that can be demonstrated successfully. If similar programs exist in other communities, a description should be included in the proposal.

### ***2.6.6. Key Personnel***

The key personnel must have the education and experience to carry out the proposed program. Additionally, they must be able to confirm their time commitments to this program (as defined in the organization's proposal) to assure that sufficient resources are available to fulfill the program requirements.

### ***2.6.7. Organizational Capacity***

The organizations must have the financial strength and organizational structure to maintain fiscal and administration operations throughout the duration of the grant period. Organizations must show success in implementing and managing current or previous programs.

#### **2.6.8. Replication**

The program model must be replicable in other communities or other populations with similar service needs.

#### **2.6.9. Sustainability**

The proposal must show how the program will be sustained.

### **2.7 Evaluation**

Each proposal received will be evaluated on the following factors:

- Compliance with minimum required qualifications (**Section 2.4**)
- Submission of a proposal that includes all required information
- Innovation of the proposed project, including the demonstrated capability to engage community members, sustain the program after the grant period ends, and replicate the program to other communities
- Cost effectiveness

During the evaluation period, the Foundation may request additional information from proposing organizations, including but not limited to phone calls, emails, or in-person interviews; site visits at the proposed project site; and presentations to the Foundation.

### **2.8 Reporting Requirements**

The Grand Slam-Home Run Awardee will be required to submit quarterly reports during each program year of the grant period. An annual report shall be submitted within thirty (30) days following the end of the program year and must include the information listed below in order to receive the subsequent years' grant funding.

- Lead organization/collaborator names and contact information
- Reporting period
- Narrative description of the program and results, including:
  - Number of participants served (actual number compared to proposed number)
  - Actual outcomes achieved compared to goals and objectives desired
  - Participant feedback leading to substantive changes to the program
  - Changes to key personnel
- Actual costs compared to projected costs
- Program improvements, expansion, or reduction, planned for the next program year, and the cost of implementation

## **3.0 INSTRUCTIONS FOR PROPOSAL SUBMISSION**

### **3.1 Foundation Point of Contact**

For questions about the solicitation, please contact Ms. Cheryl Winchester or Mrs. Jennifer Fisher via email [pgmff@phyllismargolius.org](mailto:pgmff@phyllismargolius.org). The Foundation respectfully requests that bidders do not use other methods of contact (telephone, fax, etc.).



### **3.2 Solicitation Timelines**

The key dates for the solicitation are identified below.

<b>RFP Release</b>	November 15, 2017
<b>Letters of Intent Due</b>	January 16, 2018, 2:00 p.m. ET
<b>Proposals Due</b>	March 30, 2018, 2:00 p.m. ET
<b>Proposal Evaluation</b>	April 2 – April 30, 2018
<b>Award</b>	May 1, 2018
<b>Project Start</b>	June 1, 2018

### **3.3 Submission Format**

#### **3.3.1. Delivery Instructions**

Letters of intent and proposals must be delivered to the address listed below, via US mail or commercial delivery. It is the responsibility of the bidder to ensure that submissions are received on or before the due date. No faxed or emailed submissions will be accepted. Submissions will be time and date stamped upon receipt by the Foundation. Please label your submission with the title "Program Idea Challenge Grant" and the lead organization's name.

The Phyllis Margolius Family Foundation  
Attention: Mrs. Jennifer Fisher  
7910 Woodmont Avenue  
Suite 1165  
Bethesda, MD 20814

#### **3.3.2. Letter of Intent**

A letter of intent is required. Please submit the letter of intent by the due date and time identified in **Section 3.2**. The letter of intent must:

- Be submitted by the lead organization on its letterhead
- Must identify your collaborations
- Must include a brief (one to two paragraph) summary of your project

A hard copy of your letter of intent should be submitted to the address identified above and must be received on or before the due date in order for your proposal to be considered.

#### **3.3.3. Proposal**

**Attachment A** contains the proposal template and instructions. Please use the format provided. Enter the lead organization's name and proposal title in the header where indicated.

All proposals must be received by the due date and time identified in **Section 3.2**. Please submit one signed original and one additional hard copy, as well as one electronic copy on either CD or USB flash drive.

- **Hard Copies.** Hard copies should be submitted with tabs for the major sections listed in the proposal template and should be bound or stapled securely.
- **Electronic Copy.** Please label the CD or USB with the title "Program Idea Challenge Grant" and the lead organization's name, and identify the lead organization in the file name of the electronic copy.

#### **4.0 ATTACHMENTS**

- **Attachment A** – Proposal Template
- **Attachment B** – Survey, Survey Results, and Synopsis