NFKthrive
Request for Proposals
Lead Partner Agency(s)

United Way of South Hampton Roads (UWSHR) is seeking proposals for one or more lead partner agency(s) for *NFKthrive*, a collaborative three-year project to assist residents of the City of Norfolk to achieve self-sufficiency. **Lead Partner Agency(s)** are organizations that employ staff members serving as **Mobility Mentors**.

Overview & Background

NFKThrive will provide comprehensive support to ALICE Households in the City of Norfolk. The program projects to support 360 households in moving towards self-sufficiency over a three-year period.

ALICE – an acronym for Asset Limited, Income Constrained, and Employed – households are those that earn above the Federal Poverty Level but not enough to afford a bare-bones household budget. These households struggle to manage even their most basic needs – housing, food, transportation, childcare and health care. ALICE households cannot always pay the bills, have little or nothing in savings, and are forced to make tough choices, such as deciding between quality childcare or paying the rent. One unexpected car repair or medical bill can push these families over the edge.

United Way estimates that approximately 39.6% of Norfolk households are a part of the ALICE population. The COVID-19 pandemic has exposed critical shortcomings in our economy and intensified hardship for many households who were already struggling. The future success of our communities is directly tied to the financial stability of these ALICE households. UWSHR seeks to drive measurable impact through economic mobility initiatives that support ALICE families to access tools and resources to increase income, minimize debt, improve financial stability, and ultimately achieve economic stability and self-sufficiency.

Through *NFKthrive*, UWSHR seeks to support ALICE households to reach self-sufficiency through four key program elements:
- *Mobility Mentoring®:* One-on-one coaching to partner with participants on their path to self-sufficiency
- *Housing:* Rent, mortgage, utility assistance, and co-creation of new housing solutions with other agency partners
- *Workforce Readiness:* Job training, upskilling, and employment services in growing industry clusters
- *Wraparound Supports:* Gap funding to ensure program recipients can overcome barriers, meet urgent needs, and focus on building long-term self-sufficiency

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About Mobility Mentoring

Mobility Mentoring® is a brain science-informed coaching model developed by Economic Mobility Pathways (EMPath) in Boston, Massachusetts. Over ten years ago, EMPath developed this comprehensive approach, which supports planning and organizing skills and helps families work toward economic mobility. UWSHR has been able to enhance its economic mobility work for the ALICE population through the utilization of a Mobility Mentoring-informed approach and plans to implement this approach in the framework of *NFKthrive.*

EMPath defines Mobility Mentoring® as the professional practice of partnering with participants so that over time they may acquire the resources, skills, and sustained behavior changes necessary to attain and preserve their economic independence. With a trusted mentor, a participant can think about where they are now and where they would like to be. Mentors encourage participants to dream big, and then identify small steps that will move them toward their bigger goals. Participants learn strategies to manage the daily pressures of living in poverty and how to use their executive functioning skills to their advantage.

Mobility Mentoring uses the Bridge to Self-Sufficiency® (The Bridge), as its theory of change framework. The Bridge outlines objectives to achieve across critical pillars which lead to long-term economic self-sufficiency. The Bridge also represents the concept that there are interwoven relationships between economic independence and other core domains of life. UWSHR has adapted the original Bridge to Self-Sufficiency to best reflect our local community (p.11). UWSHR's Bridge comprises 4 pillars and 10 sub-pillars as illustrated below:

Family Stability				Well-being		Financial Management		Employment	
Housing	Family	Transportation	Childcare	Physical & Mental Health	Social Networks & Support System	Debt & Spending	Savings	Education, Training & Career Management	Earnings Level & Benefits

The five key principles of Mobility Mentoring are:

- *Individualization:* There is no "one size fits all" path to economic independence; all services must be individualized within the Mobility Mentoring framework to best support an individual to attain success in their journey to economic self-sufficiency.

- *Horizontality:* The path to economic independence cannot be found in any one health or human service silo; effective service delivery must "bridge" the silos to achieve stability in each of the pillars.

- *Time:* There is no quick journey from poverty to self-sufficiency; effective interventions must provide for continuity of support over time. Low-income families must overcome many hurdles and challenges. To be successful and sustain that success requires a patient, long-term approach.

- *Co-investment:* An individual can only fully achieve success when they are invested in that success. The program will be most efficient in its use of resources and its ability to support its participants if it meets participants where they are, matching their effort and commitment.

- *Networking:* No one gets to economic independence alone. Personal and professional networks provide crucial support and leverage for the journey, therefore effective interventions help participants build those networks.

By embracing these principles, Mobility Mentors are best positioned to coach participants in setting priorities, developing action plans, honoring commitments, connecting to resources and achieving goals.

There are _four essential elements_ that are the backbone of all Mobility Mentoring services and must be present in any program for it to be considered a Mobility Mentoring program. These are:

1. *Coaching:* Coaching is a participant-directed, one-on-one partnership. Coaches work with participants to strengthen their decision making, persistence and resilience over time. Through repeated practice, this process becomes internalized and enables the participants to mentor themselves.

2. *Bridge to Self-Sufficiency®:* Mobility Mentoring requires use of the Bridge as both an assessment tool and a framework within which a participant can set goals and chart their path to economic self-sufficiency. The layout of the Bridge facilitates integrated, future-oriented decision-making and acts as a coaching tool for improving the participant's executive functioning skills. The basic executive functioning skills are working memory, impulse control and mental flexibility; these are the primary decision-making skills necessary for the problem solving, goal setting, and goals attainment necessary to achieve and sustain economic independence.

3. *Goal Setting:* The Bridge to Self- Sufficiency acts as a blueprint for participants to set clear, individualized goals. Participants determine their own goals, and mentors support participants in prioritizing what they'd like to work on, strategizing around potential barriers and challenges, and thinking through options for additional resources and support. As participants achieve goals, they move up the Bridge closer to economic self-sufficiency.

4. *Recognition:* Recognition acknowledges and celebrates a participant when they are working toward and when they accomplish a goal and supports successful goals achievement. Types of recognition may be tangible or intangible and include celebrations of success, certificates, supportive messages, or earned incentives. Type of recognition is based on the difficulty and complexity of the goals achieved.

It is important to distinguish between the mentoring-coaching role and traditional case management. Although Mobility Mentoring and traditional case management share many commonalities, the fundamental differences lie in the duration, focus and nature of the work. Mobility Mentoring requires extended engagement over time, a focus on attainment of individually established, multi-faceted, long-term goals, and coaching for lifelong skill-building and behavior change. In contrast, traditional case management is usually of relatively short duration, focusing primarily on crisis intervention and attainment of program-mandated goals.

Program Parameters
United Way of South Hampton Roads has established the following parameters to guide development and implementation of *VBthrive*.

Target Population
UWSHR seeks proposals that focus on residents of the City of Norfolk, specifically ALICE households. The target population includes those who have some income from employment or benefits or are in school full-time and are safely and stably housed. The areas highlighted in orange on UWSHR's Bridge provided on pg. 11 illustrate the tiers on the Bridge in which the target population will likely fall.

ALICE households: This population is defined based on annual household income and in accordance with the state of Virginia ALICE Report. The below illustrates the ALICE household survival budget for the

city of Norfolk. This includes the minimal estimate of the total cost of household essentials — housing, childcare, food, transportation, health care and a smartphone plan, plus taxes and a miscellaneous contingency fund equal to 10% of the budget.

	Single Adult	1 Adult, 1 Child	1 Adult, 1 in Child Care	2 Adults	2 Adults, 2 Children	2 Adults, 2 in Child Care	Single Senior (65+)	2 Seniors
Monthly Total	$2,981	$4,033	$4,602	$4,019	$6,219	$7,356	$3,149	$4,275
Annual Total	$35,772	$48,396	$55,440	$48,228	$74,628	$88,272	$37,778	$51,300
Hourly Wage	$17.89	$24.20	$27.72	$24.11	$37.31	$44.14	$18.89	$25.65

The ALICE Household Survival Budget can also be customized for different household sizes using the numbers below:

Add 1 Adult	Add 1 Senior	Add 1 Infant	Add 1 Preschooler	Add 1 School-Aged Child
$16,725	$17,765	$20,394	$19,644	$13,205

Program Framework
NFKthrive will provide support to ALICE households through a Mobility Mentoring- informed approach. Participants will be paired with a mentor who will work with them on personalized goal setting and support them to acquire the resources, skills, and sustained behavior changes necessary to obtain and maintain economic self-sufficiency. Participants will be linked to services with community partners to address needs and help them move up identified pillars of The Bridge and will receive recognition and incentives along the way.

Collaboration & Anticipated Roles
Implementation of *NFKthrive* will require a centralized infrastructure, a dedicated group of partner agencies and a structured process leading to the common agenda of supporting Norfolk families in reaching self-sufficiency. To ensure consistency and maximum effectiveness, training, execution, data collection and continuous communication, of which UWSHR will serve as the backbone support, will need to be embraced by all partners.

Roles and responsibilities of Lead Partner Agency(s) are outlined below:

1. Identify or hire staff members to serve as Long-Term Mobility Mentors
   o The role of Mentors will include:
     - Exclusive focus on supporting participants of *NFKthrive*
     - Working closely with a caseload of assigned participants
     - Providing community-based, low-barrier, person-centered supports at times and locations that meet the needs of participants
     - Supporting data collection and assessment
   o Requirements and training:
     - Mentors should have a bachelor's degree or the equivalent work or life experience.
     - Mentors and partner agencies should commit to be trained in and adopt a Mobility Mentoring-informed approach, guided by the model's core principles and elements of practice. A training curriculum developed and guided by UWSHR through its membership with EMPath's Economic Mobility Exchange™.
   o Staffing:

- The goal for 2023 is to staff the program with 4 long-term mentors.
2. Adopt a Mobility Mentoring-informed supervision approach
   o The coaching relationship between supervisor and supervisee is parallel to the relationship between Mobility Mentor and participant. To demonstrate this parallel process, supervisors and administrators of lead partner agencies should integrate the four essential elements of Mobility Mentoring listed above into their supervision approach. UWSHR intends to implement parallel practices into the framework of *NFKthrive*, including a system for providing recognition and incentives to mentors to acknowledge contributions to the team, hard work, and achievement of goals.

3. Contribute to program development and implementation
   o Lead Partner(s) will have significant input into its design and implementation of *NFKthrive*. Regular team meetings about core aspects of the program, progress towards implementation, obstacles, and results will be an essential component for success. This ongoing communication will also serve to facilitate learning from one another and aligning agency efforts to support each other. We value the time and resources expended on collaboration and planning and agencies should include the anticipated costs associated with this in their proposed budgets.

Administration and Supervision
Administration and supervision of *NFKthrive* will be the role of UWSHR. UWSHR employs Lead Mobility Mentors who will provide direct staff support for the Mobility Mentoring team.

United Way Lead Mobility Mentors are trained in Mobility Mentoring and have responsibility for:
- Oversight of referrals
- Caseload management
- Documentation review and quality assurance
- Data management, outcomes and performance measurement
- Carrying a partial caseload of participants
- Communicating with partner agency supervisors/administrators to address staff issues or concerns

UWSHR will have the primary responsibility for monitoring fidelity and quality assurance. This will involve review of progress notes and other file documents, client and staff surveys, and analysis of data.
Lead partners will have a close working relationship with UWSHR staff, specifically the Director of Economic Mobility and Lead Mobility Mentors. Partner agency staff (Mobility Mentors) will serve as an extension and representatives of UWSHR. UWSHR will monitor Mentors' performance and make recommendations to partner agency administration regarding performance management and improvement. While the direct program oversight and administration will be the role of UWSHR, Mentors will be employees of the partner agency(s) and UWSHR understands that the partner agency will incur costs associated with this. As such, agencies should include the anticipated costs associated with this in their proposed budgets.

Additional Criteria:
- Lead partner agencies should be willing to working with participants who enter through different programs and referrals outside of their own organization.
- Lead partners should be willing to adopt UWSHR's shared case management software and utilize this system for data related to *NFKthrive*.

Target Result

Over a three-year period, UWSHR proposes to serve 360 total households receiving long-term mobility mentoring. United Way envisions a world where all those who work to keep our local economy running can support themselves and their families. Therefore, we seek proposals that aim to support Norfolk families with achieving economic independence defined by increased income and attaining careers that move towards earning a living wage. To achieve this longer-range goal, *NFKthrive* will empower participants to work towards smaller, individualized goals that address the obstacles standing in their way along the Bridge.

Data Collection & Measurement

Consistent with UWSHR's focus on analyzing data to identify community needs and using this data to drive decision making, data collection and reporting is a major expectation of lead partner agencies. Monitoring of performance data and outcomes will be the responsibility of UWSHR and Lead partners should be willing to adopt UWSHR's shared case management software and utilize this system for data related to *NFKthrive*. Having this infrastructure in place will increase efficiency, improve participant experiences, and enable data sharing across agencies, boosting the capacity for real-time outcomes and performance tracking. Accurate and timely documentation of program activities will facilitate real-time learning so that the program's design can be continuously assessed and improved over time. As the backbone and administrator for *NFKthrive*, UWSHR will have both possession of and responsibility for all data and intellectual property produced through its programs and services.

A collection of existing Mobility Mentoring measurement tools are available through EMPath's Economic Mobility Exchange™ and will be utilized to support data collection and assessment. Many of these tools are organized along each of the Bridge pillars since achieving economic self-sufficiency entails achieving goals across these domains. Participant data collection will take place at entry, regular intervals during participation, and at exit. The measures below represent the types of data that will be tracked using Mobility Mentoring tools and other resources:

- Number of referrals to program
- Number of participants enrolled in the program
- Participant engagement (training/meeting attendance)
- Number of participants who successfully complete the program
- Goal achievement rate
- Increase in housing stability
- Increase in educational attainment
- Increase in earned income
- Decrease in debt
- Increase in savings
- Increase in credit score
- Number of individuals served who participate in job skills training
- Number of individuals served who access financial products and services

Learning Network & Support Resources

UWSHR staff are available to consult and advise applicants during the submission process. Additionally, all agencies selected through the RFP process will have access to the Economic Mobility Exchange Learning Network through the UWSHR coalition membership. EMPath created the Learning Network to support organizations around the country and world with learning about and implementing a Mobility Mentoring-informed model. The Learning Network offers a robust set of resources, including a library of webinars, adapted tools, and specialized technical assistance and training.

In addition to [EMPath's own programs](), below is a case study of how one organization implemented the model.

- [United Way of Bartholomew County]()

Eligibility
This opportunity is open to both United Way certified agencies and agencies who are not certified. Non-certified agencies must provide additional information to accompany their application.

Submission Process, Deadline & Technical Assistance
Step 1: Application Submission: All applications should be submitted electronically by 11:59 pm on January 13, 2023 (The template for the Application Proposal is provided on p. 9-11)

The full online application can be found [HERE]()

Information entered into this form cannot be saved and revisited at a later date. It is suggested that agencies use the Application Proposal Template below to draft answers to the questions and gather all required documents so that when you begin the form, you can complete it in one sitting.

For questions and technical assistance, please contact Kim Heath, Director of Economic Mobility, at [kheath@unitedwayshr.org]() or (757) 853-8500 x133.

Step 2: Initial Review: United Way of South Hampton Roads will evaluate applications and determine eligibility.

Step 3: Agency Interviews: Agency representatives will be asked to meet with designated UWSHR staff for an interview between January 18-19. These short interviews will be discussion-based and will allow for the UWSHR staff to ask specific questions to the agency representatives based on their proposals.

Step 4: Selection Process: UWSHR staff will score both the applications and interviews based on a clearly outlined selection criteria. Final decisions will be made by January 25 and agencies will be notified no later than January 27.

NFKthrive Lead Partner RFP Important Dates	
Submission Deadline	January 13, 2023
Agency Interviews	January 18-19 (TBD)
Final Decision	January 25
Notification	January 27

Template: Application Proposal

1. Agency name
2. Tax ID Number (EIN)
3. Contact Name (First and Last)
4. Contact Phone Number (XXX-XXX-XXXX)
5. Extension
6. Contact Email Address
7. Street Address 1
8. Street Address 2
9. City
10. State (XX)
11. Zip Code

12. Please provide a brief description of how you envision your organization's role in NFKthrive.

13. Provide a short rationale explaining whether (and how) this opportunity aligns with your agency's mission

14. Provide a short rationale explaining why your agency wants to serve in this capacity.

15. Provide a short rationale explaining the reasons and/or factors you believe equip you to take on this role.

16. Describe your staffing plan for the project (i.e., how many mentors would your organization hire) and an anticipated timeline for recruitment, selection, and onboarding.

17. What are the core services your agency provides? List names and a brief description of each service.

18. What staff at your agency will serve as the primary leads in terms of identifying or hiring staff to fulfill the role(s) identified above and participate in program design and implementation? Please include titles of key positions and a brief narrative of staff experience.

19. Describe your agency's experience participating in collaborative projects with other agency partners. Given the administration and supervision roles outlined above, how will your staff work collaboratively with UWSHR and other partner agency staff?

20. What about adopting a Mobility Mentoring-informed approach most excites and motivates your agency?

21. Given the principles of the parallel relationship between Mobility Mentor and participant and supervisor and supervisee, how would your agency demonstrate this parallel process? What system for providing recognition and incentives to mentors might you implement as a part of this program?

22. What concerns or hesitations do you have, if any, regarding the potential for your agency to adopt this approach and participate *NFKthrive*? From your individual agency perspective, what might be

the most challenging part of participating in this program? How might UWSHR support you in overcoming these challenges?

23. Referencing the parameters for target population outlined above, what tools and practices does your agency have that will assist in recruiting participants? What steps would you take to prepare and encourage potential participants for involvement *NFKthrive*?

24. Considering the target results outlined above, how many participants do you anticipate supporting in the first year? Please provide an honest explanation for what you believe is feasible considering factors such as staffing and developing infrastructure.

25. Describe your agency's presence in Norfolk. Where might you meet with participants and hold coaching sessions? Discuss how you will ensure accessibility and convenience for participants.

26. Describe the ideal training arrangements that will be necessary, both in terms of onboarding and ongoing training. Specifically, what topics should be covered and how much training do you think is needed (e.g., # hours)? Please also include any existing training resources that your agency may contribute to the collective training of *NFKthrive* staff.

27. Describe your ideal scenario and timelines for planning and implementation of *NFKthrive*. At what frequency would you expect to participate in team meetings to facilitate planning and ongoing communication?

28. Provide a three-year budget projection with a breakdown of estimated costs based on the resources needed to establish and launch the program. Include a narrative that explains your budget. The following categories are suggested though not comprehensive.
    - Planning (meetings, mileage, etc.)
    - Staffing (breakdown of compensation to include base salary and benefits)

29. Indicate whether your Board of Directors and/or agency ED and leadership team are aware and supportive of your participation in this opportunity.

Diversity, Equity, and Inclusion

30. Please provide the racial/ethnic category of your organization's lead executive (CEO or Executive Director). You may select multiple options if applicable.
    Categories:
    American Indian or Alaska Native
    Asian
    Black or African American
    Hispanic or Latino
    Native Hawaiian or Other Pacific Islander
    White
31. Among your organization's Board of Directors, what percentage is Non-White?
32. Among your organization's employees, what percentage is Non-White?
33. Among the individuals typically served by your organization, what percentage is Non-White?

All applicants are asked to provide a three-year budget projection with a breakdown of estimated costs based on the resources needed to establish and launch the program. Include a narrative that explains your budget. The following categories are suggested though not comprehensive: planning (meetings, mileage, etc.), staffing (breakdown of compensation to include base salary and benefits)

Non-United Way Certified agencies must provide the following documents:

- IRS Form 990 for the most recently completed fiscal year
- Audit or External Financial Review for most recently completed fiscal year
- Board of Directors Roster (with titles and places of employment)

	FAMILY STABILITY			WELL-BEING		FINANCIAL MANAGEMENT		EMPLOYMENT			
	Housing	Family	Transportation	Childcare	Physical & Mental Health	Social Networks & Support System	Debt & Spending	Savings	Education, Training & Career Management	Earnings Level* & Benefits	**4 PILLARS** / **10 SUB-PILLARS**	
5	I have stable, safe housing that is a home of my choosing, and am able to comfortably pay the cost. *Paying 1/3 or less of household gross pay	My family and dependents are thriving, and do not face obstacles that cannot be easily managed.	I have consistent, reliable transportation that gets me where I need to go, with a backup option if necessary.	I have affordable, quality childcare that is reliable and of my choosing and I have a backup option. [OR] I have no children.	I am fully able to engage in work, school, or family life because I can manage my physical and mental health needs.	I have people in my life who I trust, give me personal support, and have the knowledge and connections to help me achieve my goals.	I have no debt [OR] I have no debt other than mortgage, education, and/or car payments and am current or ahead in all payments.	I have three or more months of expenses saved in mainstream banking for future needs.	I have completed at least a bachelor's degree or higher.	I have a job with earnings ≥ 80% AMI (Family-Sustaining Wage)	
4	I have stable, safe housing and pay for it on my own. *Paying more than 1/3 of household gross pay	My family (or dependents) face obstacles that rarely cause stress and interrupt my daily activities.		I have reliable childcare that I can count on, and I have a backup option.	I am mostly able to engage in work, school, or family life because of physical and mental health needs.	I mostly have people in my life who I trust and who give me personal support.	I am current in all debts and I am making more than the minimum required payments on one or more.	I have more than two months but less than three months of expenses saved in mainstream banking for future needs.	I have at least an associate degree, professional certification, and/or licensure.	I have a job with earnings between 50% - < 80% AMI.	BRIDGE RUNGS — Each box under each sub-pillar represents one "tier." Upward movement along the tiers shows participants' progression from crisis to stability to thriving. Note that each sub-pillar has 5 tiers (numbered to left) except transportation, which has 4 tiers.
3	I have stable, safe housing and contribute towards the cost. *Subsidy or other shared arrangement	My family (or dependents) face obstacles that sometimes cause stress and interrupt my daily activities.	I have one transportation option that I can count on, but no backup. I occasionally miss or reschedule appointments.	I have reliable childcare that I can count on, but no backup.	I am somewhat able to engage in work, school, or family life because of physical and mental health needs.	I sometimes have people in my life who I trust and who give me personal support.	I have debts and am making minimum required payments on all of them.	I have one to two months of expenses saved in mainstream banking for future needs.	I am attending or have completed job training and/or entry level certification.	I have a job with earnings > 30% - < 50% AMI.	
2	I am living in temporary or unsafe housing, or am at risk of losing housing	My family (or dependents) face obstacles that regularly cause stress and interrupt my daily activities.	I have transportation options, but they are not reliable. I frequently miss or reschedule appointments.	I have childcare options, but they are not reliable.	I am struggling to engage in work, school, or family life because of unaddressed physical and mental health needs.	I occasionally have people in my life who I trust and who give me personal support.	I have debts and am making less than minimum payments on at least one.	I have some money saved for future needs but it is less than one month of expenses.	I have or am currently completing a high school diploma or GED.	I have a job with earnings ≤ 30% AMI.	
1	I do not have housing.	My family (or dependents) face significant obstacles that require immediate attention, cause stress, and severely limit me from my daily activities.	I cannot get where I need to go.	I do not have childcare.	I am not able to engage in work, school, or family life because of unaddressed physical and mental health needs.	I do not have people in my life who give me personal support. [OR] My social network is draining or destructive.	I have debts and I am currently not making any payments.	I do not have any savings.	I do not have a high school diploma or GED.	I have no income or benefits. *Income ranges are based on VA Data from HUD's AMI tables	
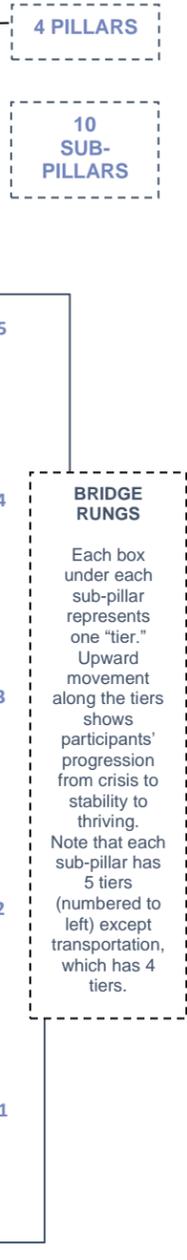
*Adapted with permission from Economic Mobility Pathway's Bridge to Self-Sufficiency™: https://www.empathways.org/

United Way SOUTH HAMPTON ROADS