Early Wealth Partnership

# Request for Proposals
# Early Wealth Accounts Outreach & Enrollment Mini-Grants Program

## FUNDING OPPORTUNITY

The Outreach & Enrollment Micro-Grant Program provides **one-time grants** to community-based organizations, schools, and trusted partners to cover costs associated with outreach and enrollment events and campaigns promoting early wealth-building accounts for California children and youth. Groups that cross-promote more than one early wealth account program — CalKIDS, HOPE Trust Accounts, local CSA programs, and/or 530A Trump Accounts — will be prioritized for funding.

### Grant Amount

$500–$3,000 (one-time award)

### Funding Purpose

Support direct outreach and enrollment activities that:

- Increase awareness of eligible accounts
- Provide on-site enrollment/claiming assistance
- Promote cross-program clarity
- Reduce barriers for priority populations

## ACCOUNTS TO BE PROMOTED

Applicants may promote one or more of the following:

- CalKIDS
- CalABLE
- HOPE Trust Accounts
- Local CSA programs (see list below)
- ScholarShare 529
- 530A (Trump Accounts)

Applicants must explain how they will clearly communicate differences between accounts and reduce confusion for families.

## ELIGIBLE APPLICANTS

- California-based nonprofit organizations
- School districts and school-based organizations
- Community-based organizations
- Faith-based organizations
- Public agencies
- Tribal organizations

Applicants must demonstrate trusted relationships within the communities they propose to serve.

## PRIORITY POPULATIONS

Proposals serving the following communities are strongly encouraged:

- Low-income public school students
- Foster youth
- COVID-bereaved youth
- Youth with disabilities
- Immigrant families
- English learners
- LGBTQ+ youth
- Homeless or housing-insecure youth
- Rural and Tribal communities

## ALLOWABLE USES OF FUNDS

Grant funds may support:

- Outreach events or workshops
- Enrollment/claiming assistance events
- School-based outreach
- Translation and interpretation
- Disability-accessible accommodations
- Printed materials
- Technology for on-site portal access
- Staff or ambassador stipends
- Venue rental or food (if directly tied to outreach)

Funds may not be used for unrelated general operating expenses.

## REQUIRED OUTCOMES

All grantees must track and report measurable engagement outcomes.

### 1️⃣ Population Reach

- Number of children/youth reached
- Number of parents/guardians reached
- Which Priority Population(s) participated

### 2️⃣ Account Engagement Funnel

For each account promoted, grantees will be required to report the number of individuals they helped:

- Provided written materials
- Assisted to obtain SSID (school ID)
- Assisted to visit online account enrollment portal(s)
- Completed enrollments/claiming online

This two-tier model asks grantees to report awareness, engagement, and successful enrollment.

## APPLICATION REQUIREMENTS

Applicants must submit:

- Organizational information
- Description of proposed outreach activity
- Target populations
- Cross-promotion plan
- Projected outcome metrics
- Budget and short narrative

Applications must clearly align projected outcomes with requested funding.

## RECOMMENDED TRAINING RESOURCES FOR OUTREACH STAFF

We highly recommend the following training tools created by the CalKIDS Institute at UCLA for your staff and volunteers:

**CalKIDS 101: Training for Outreach Staff & Volunteers**

**CalKIDS 201: Outreach Strategies for Partners & Champions**

## REVIEW CRITERIA & TIMING

Applications will be reviewed in batches in the **first and third week of every month.** Please allow 30 days to receive a decision on your funding request.

Applications will be evaluated based on:

- Strength of community relationships
- Clarity of outreach and enrollment strategy
- Cross-program promotion approach
- Equity and accessibility considerations
- Feasibility and staffing capacity
- Alignment between projected outcomes and budget

## REPORTING REQUIREMENTS

Grantees must submit a Final Report within 30 days of the event/promotion or 60 days of the grant award, whichever is later. A short Final Report form which includes Outcome Funnel data and budget certification, will be included in the grant agreement. Event photos and participant testimonials are greatly appreciated.

## EWP COMMITMENT

EWP is committed to equity-centered outreach, cross-program clarity, and removing barriers so that every eligible child in California can access early wealth-building opportunities.

We look forward to partnering with trusted community leaders across the state.