Advancing Economic Opportunity Among Older Adults—AARP Foundation Seeks Proposals for Direct Service, Evidence-Based Projects

Vision: A country free of poverty where no older person feels vulnerable.

Mission: AARP Foundation serves vulnerable people 50 and older by creating and advancing effective solutions that help them secure the essentials.

Application Deadline: April 22, 2020, 5:00 p.m. ET

AARP Foundation Grantmaking Overview

AARP Foundation works to end senior poverty by helping vulnerable older adults build economic opportunity. As AARP's charitable affiliate, we serve AARP members and nonmembers alike. Through our grantmaking, we support organizations to advance evidence-based projects that can become sustainable and practical solutions to the challenges facing low-income older adults, sparking bold, innovative solutions that foster resilience, strengthen communities and restore hope.

AARP Foundation Focus on Building Economic Opportunity

AARP Foundation has ambitious goals for serving low-income people age 50 and older (LI50+) and achieving measureable outcomes. These goals focus on increasing income and decreasing expenditures for our population (LI50+). Related to income, our focus is increasing earnings, savings, including retirement savings, and Social Security benefits. Related to expenditures, our focus centers on decreasing housing, health care, food and transportation expenditures.

With this Request for Applications (RFA), AARP Foundation seeks direct-service projects with evidence of effectiveness that low-income older adults who participate in the proposed project experience an increase in economic opportunity (increased income or reduced expenditures).

To illustrate evidence of effectiveness, the following are a few examples of direct-service solutions with strong and consistent research/evidence showing their effectiveness for increasing economic opportunity among low-income older adults: providing vouchers or subsidies for healthy food to decrease food expenditures and home weatherization for decreasing housing expenditures.

Other examples of solutions to help low-income older adults earn more income include workforce programs that provide short term, affordable and/or work-based upskilling or reskilling opportunities that help low wage older workers gain the skills and competencies needed for employment in the fastest growing technology-driven sectors in the economy, programs supporting family caregivers, workplace financial education, and retirement reforms (e.g. establishing an automatic IRA contribution),

Please note: there is a separate funding opportunity for Education, Outreach, and Field-building projects. Application requirements and funding levels vary based on the type of project (see RFA page 4).

Advancing Effective Solutions

Direct Service Definitions

For this Direct Service funding opportunity, applicants should review the following chart to identify which classification is most relevant to the proposed project.

	Classification Definitions
Direct Service	Projects directly serving low-income older adults. Direct service grant funding must be used to enhance direct services or projects/programs for low-income older adults. • Ready to Pilot: Small-scale projects to test the feasibility of a project's approach, methods, and procedures that are intended to be used in a larger-scale project. The program model is developed and it needs to be tested thoroughly in multiple locations and/or among a low-income older adult population. • Ready for Outcomes: Program has been developed, pilot-tested and implemented among low-income older adults. A program/project evaluation was conducted that indicated program participants achieved the program outcomes. • Ready to Scale: Program has been independently evaluated and has demonstrated moderate to strong evidence of effectiveness and needs to be expanded or scaled (see Appendix B for details regarding Ready-to-Scale projects).

Levels of Evidence

AARP Foundation requires all Direct Service applicants to clearly describe their program's level of evidence and provide supporting documentation in the form of a theory of change with references to the literature, a logic model, output and outcome data collection plans, and all final and relevant evaluation reports. Evaluation reports should include a description of methodology and a detailed results section. Ready to Scale projects must include evaluations demonstrating moderate to strong evidence of effectiveness and a scaling plan

Depending on the stage of program development and experience with implementation, adaptation and evaluation, we expect proposed direct service projects to have varying levels of evidence that demonstrate their effectiveness along a continuum from pre-preliminary to strong. AARP Foundation has adapted its evidence descriptions based on the Corporation for National and Community Service's evidence of effectiveness definitions as follows:

	Level of Evidence Definitions
Pre-Preliminary	The program is supported by a theoretical framework (theory of change) and has a logic model with inputs, activities, outputs and outcomes.
Preliminary	In addition to having a theory of change and logic model, the organization has a data management system in place, such that outputs and outcomes may be monitored and

	Level of Evidence Definitions
	tracked consistently. A non-experimental evaluation has been conducted on the program that was able to demonstrate improved outcomes among participants.
Moderate	An independent evaluation has been conducted that had a well-implemented design with findings that support program effectiveness, but with limited generalizability. There may have been a strong correlation between the program model and the outcomes produced, but no causal relationship could be established without a comparison group.
Strong	More than one independent evaluation was conducted that had a well-implemented design with findings that support the effectiveness of the program, OR one large well-implemented randomized controlled, multi-site study with findings that support the effectiveness of the program.

Data Collection Requirements

Direct Service grantees will be required to collect and report year-to-date information on the **number of people** and the **number of low-income people aged 50 and older** served by their grant-funded project on a quarterly basis. AARP Foundation's definition of low-income is income at 250% or below of the Department of Health and Human Services (HHS) Federal Poverty Guidelines (guidance is provided). Grantees shall report progress against the indicated projections stated in the approved application, as well as additional metrics relating to participant **demographics**, **Net Promoter Score (customer satisfaction)**, and **Strategic Objectives**.

Direct Service applicants will be assessed on whether the proposed project aligns with AARP Foundation's strategic objectives and whether the organization has the capacity to measure project participant outcomes, such as dollar ($) increase in income and/or decrease in expenditures.

Additional information on AARP Foundation's required reporting and outcomes measurement for Direct Service grantees may be found on AARP Foundation's Grant Program Data Collection webpage, here.

AARP Foundation is currently undergoing a process to develop its 6-year strategic plan that will begin in 2021. Any changes made to strategic objectives and/or guidelines for data collection will be communicated to grantees in a timely manner.

Reporting & Payment

Award recipients will be required to submit calendar-year quarterly reports that provide programmatic and financial status of their project. Grant payments will be provided in fixed amounts and in accordance with the payment schedule outlined in the award letter. Final payments will be made based on demonstrated ability to expend all awarded grant funds by the end of the project term.

Funding Eligibility

This funding opportunity is primarily intended for national or regional organizations with built-in distribution channels, such as affiliates, members, chapters or collaborative partnerships. Local organizations will only be considered if they have the ability to serve thousands of low-income older adults, on their own or in conjunction with other organizations.

The following are not eligible for funding:

- Grants for individuals;
- Debt retirement or operating deficits;
- Endowments or reserve funds;
- Political organizations or campaigns;
- Lobbying legislators or influencing elections;
- Sponsorship of fundraising events;
- Marketing endeavors and personal research;
- Organizations located outside the United States or its territories; or
- Indirect expenses unrelated to the project being funded.

Grant Award Information

Grant Term: Beginning July 1, 2020

AARP Foundation is committed to investing in innovative projects to serve thousands of low-income older adults. The final investment amounts will depend on a combination of factors including the number of low-income older adults the proposed project will serve over the grant period, the strength of evidence of program effectiveness, the ability to collect, analyze and report outcomes and the viability and strength of the proposed scaling plan (if applicable).

In general, Direct Service projects will receive range from $100,000 to $250,000 per year, for up to three years.

	Application Requirements		
	Pilot	**Outcomes**	**Scale**
Funding Range	Maximum award of $150K per year, for up to 3 years	Maximum award of $250K per year, for up to 3 years	Maximum award of $250K per year, for up to 3 years
Application Sections			
Contact	X	X	X
Organizational Details	X	X	X
Project Details	X	X	X
Financial Information	X	X	X
Evidence & Measurement	X	X	X
Scaling Plan			X

	Application Requirements		
	Pilot	Outcomes	Scale
Attachments			
Theory of Change	X	X	X
Detailed project budget	X	X	X
Most recent audited financial statements	X	X	X
Outputs Data Collection Table	X	X	X
Outcomes Data Collection Table	As applicable	X	X
Logic Model	X	X	X
Evaluation reports as applicable.	X	X	X
Scaling Plan			X

Grant Application Process

Eligible applicants are invited to submit an application that contains background about their organization, detailed information about their project model and its implementation, and how their project aligns with AARP Foundation's mission and the objectives specified on page 1 of this RFA. Application questions are located in Appendix A of this RFA. *Please note: this RFA is for Direct Service applicants only. There is a separate funding opportunity for Research, Education, Outreach, and Field-Building projects.*

All applications must be completed online in the AARP Foundation Community Portal. **The application deadline is April 22, 2020, 5:00 p.m. ET.**

Click here to access the online application.

Applicants that are currently funded or have previously been funded by AARP Foundation should have an existing Community Portal account. After clicking on the application URL above, please sign in **using your same username and password login credentials**. Failure to do so may result in the creation of a duplicate account for your organization.

Newly applying organizations must create an account in AARP Foundation's Community Portal. After clicking on the application URL above, select the '**Register**' button on the login page and follow the prompts to enter your contact information and organizational details.

NOTE: Once you have initiated the application process by selecting the above link and creating an account, you should not click on the link again. To access your in-progress application, simply navigate directly to the AARP Foundation's Community Portal and sign in using your login credentials.

Review Process

Application submissions undergo a thorough review process, and a limited number of organizations are selected as finalists. During the review, you may be asked to respond to clarification questions and participate in a follow-up conversation (which may include video conferences or an on-site visit).

Timeline

March 2020: Funding opportunity announced and online application made available

April 22, 2020, 5pm ET: Proposal deadline

May 13-27, 2020: Clarification period (as needed)

June 2020: Applicants notified of award decisions and funding determinations

July 1, 2020: Grant Start Date

Contact

For questions related to this RFA or relating to application submission in the AARP Foundation Community Portal, please send an email to the AARP Foundation Grants Management mailbox at aarp_foundation_grants@aarp.org.

Appendix A: Application Questions

The application allows you to provide details on the proposed project for which you are seeking funding from AARP Foundation based on the type of project proposed (see grant classification definitions on page 2 of this RFA). Please be specific and concise, and include the required attachments.

Funding Eligibility

AARP Foundation does not support funding requests for any of the following:

- Grants for individuals;
- Debt retirement or operating deficits;
- Endowments or reserve funds;
- Political organizations or campaigns;
- Lobbying legislators or influencing elections;
- Sponsorship of fundraising events;
- Marketing endeavors and personal research;
- Organizations located outside of the United States or its territories; or
- Expenses unrelated to the project being funded.

A. Contact

1. **Primary Contact Name**
2. **Title of Primary Contact**
3. **Primary Contact Phone Number**
4. **Primary Contact Email**

B. Organization Details

5. **Organization Name**
6. **Address**
7. **Website**
8. **Organization EIN**
9. **How did your organization learn about this funding opportunity?**
   Select from the list below
   - AARP Foundation directly
   - AARP State Office
   - Twitter
   - Chronicle of Philanthropy
   - Professional Association
   - Other: *please list* (255 character limit)

C. Project Details

10. Proposed Start Date
Please enter a proposed start date for the grant-funded project

11. Proposed End Date
Please enter a proposed end date for the grant-funded project

12. Request Name (100 character limit)
Please enter a brief title of the project (e.g., Improving Older Adult Economic Outcomes).

13. Impact Area
Please select ***"Economic Opportunity"***

14. Grant Classification
Select ***one*** from list. See page 2 of RFA for definitions:

- Direct Service-Ready to Pilot
- Direct Service-Ready for Outcomes
- Direct Service-Ready to Scale

15. Description of Proposed Project (10,000 character limit).
Give a summary of the proposed project you would undertake with funding from AARP Foundation. Include a description of the intervention from the participant's perspective, step by step.

16. Demographics (2,500 character limit)
What specific population does the project seek to serve and how do you define people served? Please be specific in terms of age ranges, income levels (and how it relates to AARP Foundation's definition of low-income), race, ethnicity and any other factors you wish to highlight. Please refer to AARP Foundation's Beneficiary Demographics Data: Supplemental Guidance.

Please note: *AARP Foundation will be following a new 6-year strategic plan starting in 2021; therefore, any changes to the definition of low-income, demographics, and strategic objectives will be communicated to grantees.*

17. People Served Definition (2,500 character limit)
Explain how your program, (1) *currently defines* an individual as "served" in relation to the number you report in **Number of People Served (Currently)** below, and (2) *plans to define* an individual as "served" in relation to the number you report in **Number of New People Served (Proposed)** below.

Please note: *AARP Foundation does not consider solely providing information to an individual as serving that individual.*

18. Number of People Served (Currently)
Enter the number of people currently served by the program. Otherwise, enter 0.

19. Number of New People Served (Proposed)
Enter the number of people projected to be served by the program.

20. Number of Low-Income Older Adults Served (Currently)
Enter the number of LI50+ individuals currently served by the program. Otherwise, enter 0.

21. Number of New Low-Income Older Adults Served (Proposed)
Enter the number of LI50+ individuals projected to be served by the program. *This should be based on AARP Foundation's definition of low-income (see guidance).*

22. Statement of Outcomes (500 character limit).
Please provide a brief summary of the project's short-term, intermediate-term, and long-term outcomes. This should include a projection of the number of people served that will attain a specific outcome as a result of the proposed intervention *(e.g. 3,000 of 5,000 older adults served will achieve $400 in savings and maintain a savings habit as evidenced by at least a single subsequent deposit).*

23. Deliverables (5,000 character limit)
List your key project deliverables, beyond the outputs and outcomes identified and described in the required attachments.

24. Plan and Key Project Milestones (1,000 character limit)
What is your timeline for project completion and the dates related to key project milestones?

25. Staff and Organization (5,000 character limit)
Describe the experiences of each individual that will have a leadership role in the project? Describe the experiences of the key individuals who will be responsible for managing and executing the proposed project overall and the proposed projects key activities, including data collection, analysis, reporting, performance monitoring and evaluation

D. Financial Information

26. Requested Award Amount
What is your requested funding amount?

27. Percentage of Total Project Budget
What percentage of your total project budget will be supported by the amount requested from AARP Foundation (e.g., the $100,000 requested from AARP Foundation represents 50% of the total budget for the proposed project)?

28. Current Project Costs
What are the current costs to run your project, absent support from AARP Foundation?

29. Budget Narrative (5,000 character limit)
Please provide a budget narrative. *Please note: AARP Foundation allows an indirect cost rate of up to 15% of the total request amount.*

30. Financial Sustainability (2,500 character limit)
Is your solution sustainable now (i.e., it generates enough revenue – without donations – to cover operational costs)?
- If yes, what are those revenue sources? What is the business model (revenue and expenses, market opportunity, etc.) to achieve sustainability? Include evidence of the price buyers will pay at your program's price. How long would it take to be sustainable based upon best case scenario, moderate scenario, worst case scenario? Please provide total months and probability for each scenario.
- If no, do you think it could be sustainable without donations? What would be the mixture of revenue sources to keep the program operating at current level and to achieve your proposed market penetration?

E. Evaluation & Measurement

31. Please select the level of evidence of the proposed project (definitions on page 2 of RFA)
- Pre-Preliminary
- Preliminary
- Moderate
- Strong

32. Level of Evidence Explanation (1,000 character limit)

Please support why you have determined your project to be at this level of evidence.

33. Additional Information (1,000 character limit)

Please provide any additional information about past or current project evaluations that are not available in the submitted evaluation reports.

Please note: *All cited literature in the application and each supporting document must be accessible to AARP Foundation through a working link and/or submitted with the proposal.*

34. Additional Information- Performance Indicators (1,000 character limit)

Please provide any additional information about your project's performance indicators and how the data will be monitored, beyond what is provided in the attached outputs and outcomes tables.

35. Administration- Measurement Tools

Describe how and when you will measure dollar increase in income and/or decrease in expenditures for the LI 50+

36. Data Collection Plan (1,000 character limit)

Describe how you will incorporate AARP Foundation demographic questions into your data collection practices.

37. **Participant Screening** (1,000 character limit)

    Describe how you will screen participants to determine whether they are new to the program and to ensure clean baseline data collection?

38. **Participant Matching** (1,000 character limit)

    Describe your plan for tracking participants from enrollment at baseline to a specified period of time after which you expect to observe and measure change in income and/or expenditures for low-income 50+.

39. **Data Collection Process** (1,000 character limit)

    Describe the methodology you will use to determine if a LI50+ participant has experienced a change in income and/or expenditures as a result of participating in your proposed program. That is, how will you track individual change and report aggregate change to AARP Foundation?

40. **Data Management** (1,000 character limit)

    Please provide any additional detail on how the proposed project's output and outcome data will be collected, managed, stored, and analyzed and by whom. *This should be complementary but not redundant to the required information provided in the Outcomes Data Collection Plan and the Outputs Data Collection Plan*

F. Scaling Plan (For 'Direct Service – Ready to Scale' Projects)

1. **Expected Increase** (2,500 character limit)
   What is the increase in the number of older adults the project will serve? What are the specific activities that will allow you to reach that goal?

2. **Cost Per Participant** (2,500 character limit)
   How is your cost-per-person-served decreasing as you scale?

3. **New Customer Cost** (1,000 character limit)
   What does it cost to acquire a new customer? What are the assumptions behind your cost?

4. **Scaling Methods** (2,500 character limit)
   Describe your method for scaling (e.g. expansion, replication or collaboration)? What are the pros and cons of the selected scaling method?

5. **Model Features** (2,500 character limit)
   What are the features of the model that are essential to its effectiveness? Please list past experiences in expanding projects to more people while maintaining program model fidelity.

6. **Method of Distribution (**2,500 character limit)
   What would your method of distribution be for the project to enter new markets?

7. **Principal Risk** (1,000 character limit)
   What is the principal risk, if any, to achieving your intended scaling plan?

8. **Model Originator** (2,500 character limit)
   Are you the originating organization of the model or are you adopting a model created by others? Do you require partners to implement the solution or achieve the program's outcomes? If yes, please list the partners and their role.

9. **Experience Providing Program** (1,000 character limit)
   What is your experience in providing the proposed program or comparable programs?

10. **Similar Programs** (255 character limit)
    What other organizations in the area you serve offer similar programs that seek to achieve the same outcomes (list organization names)?

11. **Competitive Advantage** (255 character limit)
    How is your program more effective than similar solutions in achieving your desired outcome(s)? Please provide specific metrics (costs, performance, price, features, etc.)

12. **Addressable Market** (2,500 character limit)
    Please describe the addressable market, both where the program is currently available and where it will be expanded with the requested funds. Please include the size of customer base (business-to-business and/or business-to-customer), other potential expansion funding, and program locations.

13. **Customer Reach** (2,500 character limit)
    How do you currently reach your customers? How do you plan on reaching them in the future in order to achieve proposed market penetration (in current markets and in new markets)?

G. Attachments

All Direct Service Applicants	• Theory of Change (template) • Detailed project budget (template) • Most recent audited financial statements • Outputs Data Collection Table (template) • Outcomes Data Collection Table (template) • Logic Model *(guidance and optional template)* • Final report(s) of findings from evaluation reports. These reports must include, but are not limited to, an executive summary, methodology section, and findings.

Direct Service – Ready to Scale Applicants	• Scaling Plan

***After completing the application, please be sure to click **Review and Submit** to review your responses and print the application, if desired. Then click '**Submit'** to submit the application.*

Appendix B: 'Direct Service – Ready to Scale' Projects

AARP Foundation seeks to fund bold projects with plans to scale proven, effective interventions that can demonstrate increase income or decrease in expenditures for low-income older adults. AARP Foundation seeks projects that can serve thousands of low-income older adults who are not currently being served. Organizations requesting funding for Direct Service projects that have demonstrated moderate to strong evidence of effectiveness are encouraged to include a scaling plan in their application.

Applicants should carefully consider the scalability of their evidence-based program and present a thoughtful plan that describes the project model to be scaled, addresses project fidelity and replicability, and explains how scaling will be accomplished (e.g. where is the program being expanded and who are the staff/organizations involved in the expansion).

We strongly recommend using Management Systems International's Scaling Up Management Framework, Scalability Checklist, and Scaling Up Toolkit as a framework to assess the readiness of your organization to develop a concrete plan and the potential of your program to be scaled. We urge applicants to work through the Scalability Checklist to determine whether their proposed intervention is ready both for scaling and for submission to AARP Foundation. A written scaling plan for reaching older adults that works efficiently and maximizes resources is required for Direct Service - Ready to Scale applicants. A visual representation of the scaling plan to accompany the written plan is encouraged and may be uploaded as an attachment to the application.