AARP Foundation

For a future without senior poverty.

Increasing Social Connectedness for Older Adults—AARP Foundation Seeks Effective Solutions Ripe for Exponential Growth

Applications Accepted on a Rolling Basis

Final Application Deadline: September 28, 2018, 11:59 p.m. ET

AARP Foundation Overview

AARP Foundation works to end senior poverty by helping vulnerable older adults build economic opportunity and social connectedness. We are the charitable affiliate of AARP, serving AARP members and nonmembers alike. Through our grantmaking, we collaborate with partner organizations to identify evidence-based programs that can become sustainable — real-world solutions to the challenges facing low-income older adults.

We are seeking applicants with evidence-based, innovative solutions positioned for exponential growth to bring to scale proven approaches that increase social support and connectedness among hundreds of thousands of low-income older adults.

Advancing Effective Solutions

AARP Foundation is focused on creating and advancing effective solutions to help people 50 and older build economic opportunity and social connectedness. We have ambitious objectives for increasing the number of people we serve and achieving specific outcomes by 2020, including:

- **Sustained improvement in social connectedness for 12 months for 55% of 500,000 low-income 50+ older adults served in 2020 as measured by the Duke Social Support Index.**

AARP Foundation launches new solutions that equip low-income older adults with the skills and resources to help them connect and stay connected—to each other and to their communities. Examples include but are not limited to:

- Investigating the viability of voice assisted technology to reduce or delay conditions of social isolation and its adverse health outcomes in adults aged 50+; and

- Increasing capabilities for seniors to discover, develop, strengthen, and repair personal relationships.

In addition to developing our own solutions, AARP Foundation works with external organizations that are positioned to scale evidence-based programs to increase social connectedness in older adults.

Scaling for Impact

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.

AARP Foundation seeks to fund bold projects with plans to scale proven, effective interventions via exponential growth (as opposed to linear growth), disrupting the current landscape for combating social isolation in low-income seniors.

Applicants should carefully consider the scalability of their evidence-based program and present a thoughtful scaling plan in their application, thinking through questions such as what exactly is being scaled (describe the program model), how it's being scaled with fidelity, who is doing the scaling where the scaling will take place, and the replicability of the model.

We strongly recommend using Management Systems International's [Scaling Up Management Framework, Scalability Checklist, and Scaling Up Toolkit](link) 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 makes resources go further, is required. A visual representation of the scaling plan is encouraged and may be uploaded as an attachment to the application.

AARP Foundation can assist a proposed scaling plan in multiple ways, such as investing in new technology to transform service delivery, utilizing the trusted AARP Foundation brand to enter new markets, or playing an intermediary role to connect the program with new customers and funders.

AARP Foundation anticipates collaborating with selected grantees to explore various models for growth, scalability and sustainability to ensure that programs demonstrating measurable social connectedness outcomes are positioned to serve hundreds of thousands of low-income seniors.

Evidence

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

> *Preliminary Evidence. 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 tracked consistently. A non-experimental evaluation may have been conducted on the program that was able to demonstrate improved outcomes among participants.*
>
> *Moderate Evidence. 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 Evidence. More than one 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.*

The purpose of this funding opportunity is to support programs that have been independently evaluated, with a preference for programs that demonstrated moderate to strong evidence of effectiveness.

AARP Foundation requires applicants to clearly describe their program's level of evidence and provide supporting documentation in the form of a theory of change, a logic model, data management plan, references to the literature and reports that describe how the evaluation(s) was conducted and what the results were.

The final evaluation results report from all external evaluations of the proposed program is required. A thorough and complete report of the evaluation findings should also include the evaluation methodology. Guidance is provided for creating a Logic Model and Theory of Change. Please submit a logic model that reflects how the program is currently implemented.

Finally, a data management plan (DMP) for the proposed project must be submitted. A DMP is a formal document developed at the start of a project that outlines a systematic process for attaining specific performance goals. AARP Foundation requires applicants to complete a data management plan that addresses the applicant's plan for data capture and management. A template is provided for the DMP.

Double Bottom Line: Social and Financial Return

AARP Foundation views grant-making as investments that seek a social return, particularly as it relates to increasing economic opportunity and social connectedness. The social return can be financial savings to the program beneficiary, the government, and/or the community at large as a result of a positive outcome.

AARP Foundation will require the submission of a business model canvas (BMC) with the funding application. Guidance on how to create a business model canvas is provided.

We seek interventions that have a compelling financial model, such as:

- Self-sustaining financial model not reliant on donations or grants (social entrepreneurship); or
- Break-even financial model reliant on existing and identified funders (social service).

Funding Eligibility

This funding opportunity is intended for national or regional organizations with built-in distribution channels, such as affiliates, members, chapters or collaborative partnerships. AARP Foundation is seeking organizations that seek to serve hundreds of thousands of individuals in a cost-effective manner.

The following are not eligible for funding:

- Individual affiliates or chapters of national organizations;
- 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

AARP Foundation is committed to investing in innovative solutions to serve hundreds of thousands of low-income older adults. The final investment amounts will be commensurate with the number of low-income older adults the proposed program will serve over the grant period, the strength of evidence of program effectiveness, and the viability and strength of the proposed scaling plan.

This funding opportunity requires a 1:1 dollar match (cash or in-kind) from one or more other funding sources. If you do not have matching funding for your requested grant amount, you must detail a plan for raising the matching funds in your application.

Grant Application Process

All applications must be completed online here. Applications will be accepted on a rolling basis from July 2 to September 28, 2018. **The final application deadline is September 28, 2018, 11:59 p.m. ET.**

Eligible organizations are invited to submit an application that, besides general organizational information, contains a list of basic information about your program model, how it aligns with AARP Foundation's mission and objectives, and your plans for scale.

These application submissions undergo a thorough review process, from which a limited number of organizations are selected as finalists that will be asked to answer clarification questions and participate in follow up (which may include video conferences or an on-site visit).

Application (See Appendix A)

The application provides a description of the current program you have in place. Our goal is to gain a clear understanding of the program model, your current operations, and scaling plan for achieving exponential growth to serve hundreds of thousands of low-income older adults. The application questions require concise and specific answers. Please note that to be considered for funding, you must attach a theory of change, logic model, data management plan, final reports of findings from evaluations conducted of the proposed program (reports must include evaluation methodology), and business model canvas. A visual scaling plan is encouraged and may also be uploaded as an attachment to the application.

Timeline

July 2, 2018: Funding opportunity announced and application available here.

July 1 – September 28, 2018: Applications accepted on a rolling basis.

September 28, 2018: Final Application deadline by 11:59 p.m. ET

October 2018: Clarification period (as needed)

December 2018: Organization(s) informed about funding

Date TBD: Project start date

Contact

For any questions related to this funding opportunity, please email AARP Foundation Grants, aarp_foundation_grants@aarp.org or visit the AARP Foundation Grants webpage. www.aarp.org/aarp-foundation/grants.

Appendix A: Application Questions

The application allows you to provide details on the proposed program for which you are seeking funding from AARP Foundation. Please be specific and concise, and include the required attachments.

Funding Eligibility

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

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

- Yes (If "Yes," unfortunately your organization does not meet the criteria to apply to this funding opportunity from AARP Foundation).
- No

Contact

- Salutation
- First Name
- Last Name
- Job Title
- Phone
- Email

Organization Details

- Company
- Address
- Website
- EIN
- How did your organization learn about this funding opportunity? (Select from list)
  - o AARP Foundation directly

- o   AARP State Office
- o   Twitter
- o   Chronicle of Philanthropy
- o   Professional Association
- o   Other: *please list* (255 character limit)

Program Details

- Request Name (100 character limit)
- Description of Proposed Program (3,000 character limit). Give a short summary of the program you would undertake with funding from AARP Foundation. Include a description of the intervention from the beneficiary's perspective, step by step.
- Statement of Impact (500 character limit). Provide a short statement about existing outcomes of this program. What percentage of participants achieved the intended outcome?
- Current Program Costs. What are the current costs to run your program, absent support from AARP Foundation?
- Number of people served (currently)
- Number of people served (proposed)
- Number of low-income older adults served (currently)
- Number of low-income older adults served (proposed)
- List your key project deliverables (5,000 character limit).
- What is your timeline for project completion and the dates related to key project milestones? What are the key milestones for expansion? (1,000 character limit)

Scaling Plan

What?

- What is the model you are trying to scale? Was it previously a pilot, second-stage pilot or demonstration project? (3,000 character limit).
- What is the increase in the number of older adults the program will serve? What are the specific activities that will allow you to reach that goal? (2,500 character limit).
- What specific population does the program seek to serve? Please be specific in terms of age ranges, income levels, race and ethnicity and any other factors you wish to highlight. If there are multiple approaches for different population groups, please include those here (2,500 character limit).

How?

- Describe your method for scaling (e.g. expansion, replication or collaboration)? What are the pros and cons of the selected scaling method? (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 fidelity (2,500 character limit).
- How will you (or another organization) replicate the program with fidelity as you enter a new market? (2,500 character limit)
- What would your method of distribution be for the program to enter new markets? (2,500 character limit)
- What is the principal risk, if any, to achieving your intended scaling plan? (1,000 character limit)

AARP Foundation

Who?

- 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 (2,500 character limit).
- What is your experience in providing the proposed program or comparable programs? (1,000 character limit)
- What other organizations in the area you serve offer similar programs that seek to achieve the same outcomes (list organization names)? (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.) (255 character limit).
- What are the experiences of each individual that will have a leadership role in the project? How are their experiences relevant to the execution of the project? (5,000 character limit).

Where?

- 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 (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)? (2,500 character limit)

Evidence

- Please select the level of evidence of the proposed program (see definitions on page 2) and support why you have determined the program to be at this level (1,000 character limit).
    - *Preliminary*
    - *Moderate*
    - *Strong*
- Please support why you have determined your project to be at this level of evidence (1,000 character limit).
- What type of evaluation was conducted? When was it conducted? Who conducted the evaluation? How was the evaluation conducted? What were the findings/results? (1,000 character limit).
- Describe your performance monitoring plan for the proposed project and your experience with monitoring and evaluation work (1,000 character limit).
- Describe how the proposed program output and outcome data will be collected, managed, stored, and analyzed. *This information is also required in the Data Management Plan attachment* (1,000 character limit).

Financial Information

- What is your requested funding amount?
- Please provide a budget narrative to explain budget line items and how this investment will help you scale to serve more low-income older adults (5,000 character limit).
- Is your solution sustainable now (e.g.., 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)? (2,500 character limit)
  - o 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? (2,500 character limit)
- What is the source of the required 1:1 grant matching funds? If funds are not yet secured, what is your plan for raising matching funds? (2,500 character limit)
- What does it cost to acquire a new customer? (255 character limit)
  - o What are the assumptions behind your cost? (1,000 character limit)

Attachments *(required unless otherwise noted)*

- Theory of Change *(guidance)*

- Logic Model *(guidance* and *optional template)*

- Final report(s) of findings from independent evaluation reports

- Data Management Plan *(template)*

- Detailed project budget *(template)*

- Most recent audited financial statements

- Business Model Canvas *(guidance* and *template)*

- Scaling Plan (optional)