Improving Social Connectedness among Older Adults—AARP Foundation Seeks Evidence-Based Projects

Seeking Proposals for Direct Service, Research, Education, Outreach and Field-Building 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: October 18, 2019, 11:59pm ET

AARP Foundation Grantmaking Overview

AARP Foundation works to end senior poverty by helping vulnerable older adults build economic opportunity and social connectedness. 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.

Advancing Effective Solutions

Grant Project Classifications

AARP Foundation funds grant projects that align with its mission and strategic objectives in the grant classifications of: Direct Service, Research, Education, Outreach, and Field-Building. Applicants should review the following chart to identify the classification most reflective of the proposed project.

<table>
<thead>
<tr>
<th>Classification Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Service</td>
</tr>
<tr>
<td>Projects directly serving low-income older adults. Funding for direct service grants must be used to enhance direct services or projects/programs for low-income older adults.</td>
</tr>
<tr>
<td>• 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. Program model is developed and it needs to be tested thoroughly in multiple locations and/or among a low-income older adult population.</td>
</tr>
<tr>
<td>• Ready for Outcomes: Program has been developed, pilot-tested and implemented among low-income older adults, and needs to be independently evaluated to demonstrate a higher level of evidence along the continuum.</td>
</tr>
</tbody>
</table>
Classification Definitions

- **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 Exhibit B for details regarding Ready-to-Scale projects).

### Research
Projects that apply scientific rigor and research methodology to work that will enhance knowledge about and solve challenges faced by low-income older adults.

### Education
Projects that facilitate the acquisition of knowledge, skills, attitudes, values, beliefs, and habits pertaining to low-income older adults (e.g. training, instructional material development).

### Outreach
Projects designed to increase awareness of and access to services and resources that help low-income older adults.

### Field-Building
Projects that may not directly serve low-income older adults, but advance the work of one or a group of organizations serving low-income older adults to achieve measurable and sustainable results (i.e., infrastructure support, capacity building).

### Evidence Levels
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 internal and external 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.

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. AARP Foundation has adapted its evidence descriptions based on the Corporation for National and Community Service’s evidence of effectiveness definitions as follows:

<table>
<thead>
<tr>
<th>Evidence Level Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pre-Preliminary</strong></td>
</tr>
<tr>
<td>The program is supported by a theoretical framework (theory of change) and has a logic model with inputs, activities, outputs and outcomes.</td>
</tr>
</tbody>
</table>

| **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 tracked consistently. A non-experimental evaluation may have been conducted on the program that was able to demonstrate improved outcomes among participants. |

<p>| <strong>Moderate</strong>               |
| 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. |</p>
<table>
<thead>
<tr>
<th>Evidence Level Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strong</strong></td>
</tr>
</tbody>
</table>

**AARP Foundation Strategic Objectives**

AARP Foundation has ambitious objectives for serving low-income people age 50 and older (LI50+) and achieving specific outcomes. The Foundation’s social connectedness objective is:

- **LI50+ program participants have sustained improvement in social connectedness as measured by the Duke Social Support Index (DSSI) for 6 months after being served.**

With this Request for Applications (RFA), AARP Foundation seeks direct-service projects with evidence that low-income older adults who participate in the proposed project experience improved social connectedness as measured by the DSSI. Other types of projects that improve social connectedness in low-income older adults on a systemic level (e.g. research, field-building) will also be considered. Application requirements and funding levels vary based on the type of project (see RFA page 5).

AARP Foundation advances national understanding and awareness of the complex causes and consequences of social isolation among older adults. Grantees under this RFA will contribute to **Connect2Affect**, a network of programs and resources to help build the social connections older adults need to thrive.

**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 the AARP Foundation grant funded project, on a quarterly basis. AARP Foundation’s definition of low-income is based on household size, 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 Objective Outcomes.

Direct Service applicants will be assessed to determine if the proposed project aligns with AARP Foundation’s strategic objective(s) and whether the organization has the capacity to measure project participant outcomes using the 10-item DSSI. Measuring social connectedness and submitting the respective data to AARP Foundation is not applicable to those applicants applying for funding for Research, Education, Outreach and Field-Building projects.

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](https://www.aarp.org).
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. For Direct Service projects, 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 January 1, 2020

AARP Foundation is committed to investing in innovative projects to serve tens of 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 outcomes measurement plan, and the viability and strength of the proposed scaling plan.

In general, Direct Service projects will receive higher grant award amounts than other types of projects, ranging from $100,000 to $250,000 per year, for up to three years. A typical grant award range for Research, Education, Outreach and Field-Building projects is from $50,000 to $150,000 per year, for up to two years. The majority of funded projects will be Direct Service projects, as these projects seek to immediately and directly serve the needs of low-income older adults.

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

Eligible organizations are invited to submit an application that besides general organizational information, contains detailed information about your project model and its implementation, how it aligns with AARP Foundation’s mission and the objective(s) specified on page 3 of this RFA. Application questions are located in Appendix A of this RFA. Please note that Direct Service projects require additional application questions and required attachments listed below.

All applications must be completed online in the [AARP Foundation Community Portal](https://community.aarp.org). The application deadline is October 18, 2019, 11:59 p.m. ET.

**Click here to access the online application.**

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

**Timeline**

**September, 2019**: Funding opportunity announced and online application made available

**October 18, 2019**: Proposal deadline

**November, 2019**: Clarification period (as needed)

**December, 2019**: Applicants notified of award decisions and funding determinations

**January 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.Claims@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. **NOTE: Direct Service projects require additional information, as listed in Appendix B.** Please be specific and concise, and include the required attachments.

### A. 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.

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

### B. Contact

- Primary Contact
- Title
- Phone
- Email

### C. Organization Details

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

### D. Project Details

- Start Date
- End Date
• Request Name (100 character limit) – please enter the name of your organization followed by a brief title of the project (e.g., XYZ Inc. – Improving Older Adult Outcomes).

• Impact Area – please select “Social Connectedness”

• Primary Objective – please select “Objective 6: Sustained Improvement in Social Connectedness”

• Grant Classification (Select one from list – See page 1 of RFA for definitions):
  o Direct Service-Ready to Pilot
  o Direct Service-Ready for Outcomes
  o Direct Service-Ready to Scale
  o Research
  o Education
  o Outreach
  o Field-Building

• 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.

• Statement of Outcomes (500 character limit). Please provide a brief summary of the project’s short-term, intermediate-term, and long-term outcomes.

• 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. (2,500 character limit). Please refer to AARP Foundation’s Beneficiary Demographics Data: Supplemental Guidance document.

• Number of people served (currently)
• Number of new people served (proposed)
• Number of low-income older adults served (currently)
• Number of new low-income older adults served (proposed). This should be based on AARP Foundation’s definition of low-income.

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

• What is your timeline for project completion and the dates related to key project milestones? (1,000 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)

E. Financial Information

• What is your requested funding amount?
• What percentage of your total project budget will be supported by the amount requested from AARP Foundation?

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

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

• Is your solution sustainable now (e.g., it generates enough revenue – without donations – to cover operational costs)?
  o 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? (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)

**F. Evaluation & Measurement (For All Direct Service Projects)**

- Please select the level of evidence of the proposed project (definitions on page 2 of RFA)
  - Pre-Preliminary
  - Preliminary
  - Moderate
  - Strong
- Please support why you have determined your project to be at this level of evidence (1,000 character limit).
- Please provide any additional information about past or current project evaluations that are not available in the submitted evaluation reports. (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. Describe your experience with performance monitoring and/or evaluation (1,000 character limit).
- Describe how and when you will administer the **10-item Duke Social Support Index (DSSI)** (survey provided), and **AARP Foundation demographic questions** (1,000 character limit).
- Describe how you will screen participants to determine whether they participated in your project previously, i.e., to ensure “true” baseline? (1,000 character limit).
- Describe your plan for matching participant responses from pre (baseline) to post (6 months after baseline), to determine any change in DSSI score. (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* (1,000 character limit).

**G. Scaling Plan (For ‘Direct Service – Ready to Scale Projects’)**

<table>
<thead>
<tr>
<th>What?</th>
<th>• 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? (2,500 character limit).</th>
</tr>
</thead>
</table>
| How?  | • How is your cost-per-person-served decreasing as you scale? (2,500 character limit).  
• What does it cost to acquire a new customer? (255 character limit)  
  - What are the assumptions behind your cost? (1,000 character limit)  
• 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 model fidelity (2,500 character limit).  
• What would your method of distribution be for the project 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) |
### 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).

### 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)

### H. Attachments

| All Applicants | Theory of Change ([guidance](#)) |
|               | Detailed project budget ([template](#)) |
|               | Most recent audited financial statements |

| All Direct Service Applicants | 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 |

All cited literature in each supporting document must be accessible to AARP Foundation through a working link and/or submitted with the proposal.
Appendix B: ‘Direct Service – Ready to Scale’ Projects

For Direct Service projects that have demonstrated moderate to strong evidence of effectiveness, AARP Foundation seeks to fund bold projects with plans to scale proven, effective interventions that can demonstrate sustained improvement in social connectedness in low-income older adults and disrupt the current landscape for combating social isolation in low-income seniors. In social connectedness, AARP Foundation seeks projects that can serve hundreds of thousands of low-income older adults who are not currently being served.

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 project 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 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 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.