AARP Foundation Request for Applications
Securing EITC Refunds for Older Adults

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: November 4, 2022, at 5 p.m. (ET)

AARP Foundation Grantmaking Overview
As AARP’s charitable affiliate, AARP Foundation works to end senior poverty by helping vulnerable older adults build economic opportunity and maintain financial resilience. Through our grantmaking, we collaborate with organizations to advance equitable, evidence-based projects that can become sustainable solutions to the challenges facing older adults living with low income.

AARP Foundation Focus on Building Economic Opportunity
AARP Foundation has specific objectives to achieve increasingly equitable outcomes for the population we serve — people over 50 who have low income. These objectives focus on increasing income and earnings, securing benefits, and securing refunds, and they prioritize strategies that increase equitable access and outcomes in our programs and services to address systemic barriers, racial and ethnic disparities, and other biases that perpetuate economic instability.

Earned Income Tax Credit Non-filer Grant Project Overview
With this Request for Applications (RFA), AARP Foundation seeks to support community-based organizations, to educate, engage, and assist eligible individuals who are ages 50-64 to file their taxes and claim the Earned Income Tax Credit (EITC). Specifically, AARP Foundation is interested in organizations that will assist applicants, especially in Black and Latinx communities, who have not applied in the past navigate barriers to filing their taxes and accessing the EITC.

EITC is a program that is not well known, and tax filers who are eligible often do not understand that they qualify. Annually, there are approximately 5-8 million eligible individuals who do not apply for EITC. Many of these people are “non-filers,” who would be eligible for the credit if they filed a return. Outreach to this group is difficult, and this number has remained unchanged for over a decade. The challenges in engaging eligible individuals include both their own feelings — concern that filing may have an impact on whether they pay taxes, lack of trust in providing personal and financial information — and complex eligibility requirements.

These grants will build upon learnings from the EITC grants funded for the 2022 tax season and will focus on partnering with organizations with innovative ideas of how to educate and engage adults
age 50-64 who do not currently file their taxes but who would receive the EITC if they did so. With these grants, AARP Foundation would like to learn more about:

- Effective and innovative outreach strategies to engage older adults with low income who do not file taxes and thus cannot access the EITC
- The demographics of eligible but unenrolled older adults. This includes age, race/ethnicity, geography, and whether these adults file taxes
- Specific barriers to filing and completing tax returns or difficulties with supporting documents
- New and effective ways to address barriers to filing and completing tax returns
- Any other information about the older adult’s application experience;

Grantees will be selected from priority states and territories (Alabama, Arizona, Arkansas, California, Florida, Georgia, Illinois, Kentucky, Louisiana, Michigan, Mississippi, New Mexico, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, Texas, West Virginia, the District of Columbia, and Puerto Rico), with an emphasis on states that are able to engage target populations and to conduct outreach and education. Innovative programs or technology will also play an important role in the selection of the next round of grantees.

Success will be measured by 1) increased filing and completion of tax returns leading to EITC, particularly in underrepresented communities; and 2) developing in collaboration with partners effective ways to engage and catalyze filing for EITC with non-filers.

Data Collection Requirements

AARP Foundation is committed to collecting and using demographic data to advance increasingly equitable outcomes and thus will require grantees to collect and report such data back to AARP Foundation. Direct Service grantees will be required to collect and report information on the number of people and the number of people over 50 with low income served by their grant-funded project on a quarterly basis. AARP Foundation defines low-income as equal to or less than 250% of the HHS (Health and Human Services) 2020 Federal Poverty Guidelines and rounds to the nearest $1,000 for annual income for convenience.

Grantees will report progress against the indicated projections stated in the approved application, as well as additional metrics relating to participant demographics (including, but not limited to, age ranges, income levels, race, ethnicity, sexual orientation, and disability status), 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 benefits.

Reporting & Payment

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

This funding opportunity is open to organizations who have the experience or ability to assist eligible older adults with filing tax returns and enroll eligible older adults to receiving the Earned Income Tax Credit (EITC). A key element will be a demonstrated ability to serve older adults living with low income, independently or in conjunction with other organizations.

AARP Foundation is focusing efforts in 22 U.S. states and territories: Alabama, Arizona, Arkansas, California, Florida, Georgia, Illinois, Kentucky, Louisiana, Michigan, Mississippi, New Mexico, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, Texas, West Virginia, the District of Columbia, and Puerto Rico. Applicants must be located in one of these states or territories to be eligible for funds.

The following are not eligible for funding:

- Grants for individuals
- Capital campaigns
- 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
- Indirect expenses unrelated to the project being funded

Grant Award Information

Grant Term: January 1, 2023 – December 31, 2023

Potential Award Range: $50,000 - $150,000

Indirect Cost Rate: AARP Foundation will fund an indirect cost rate of 15% of the total direct costs of the grant program

Grant Application Process

Eligible applicants are invited to submit an application that contains basic information about their project model and its implementation, and how their project’s proposed outcomes align with AARP Foundation’s mission and the objectives specified on page 1 of this RFA.

AARP Foundation will only consider applications of organizations in 22 U.S. states and territories: Alabama, Arizona, Arkansas, California, Florida, Georgia, Illinois, Kentucky, Louisiana, Michigan, Mississippi, New Mexico, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, Texas, West Virginia, the District of Columbia, and Puerto Rico. Applicants must be located in one of these states or territories to be eligible for funds.
All applications must be completed online in the AARP Foundation Community Portal. The application deadline is November 4, 2022 at 5 p.m. (ET).

Click here to access the online application: Application Link

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.

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 Criteria

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).

Timeline

October 7, 2022: Funding opportunity announced, and online application made available
November 4, 2022: Application deadline
November 7 – November 30, 2022: Application review
December 1 – December 7, 2022: Clarification period (video/calls conducted, as appropriate)
Week of December 12, 2022: Applicants notified of award decisions and funding determinations

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. Please be specific, concise, and include the required attachments.

A. Contact

Primary Contact Name
Title of Primary Contact
Primary Contact Phone Number
Primary Contact Email

B. Organization Details

Organization Name
Address
Website
Organization EIN (Employer Identification Number)

C. Project Details

Request (Project) Title (100-character limit)
Please enter a brief title of the project.

Proposed Project Goal
Please include how you will assist AARP Foundation in reaching our learning goals. How do you propose to achieve increased EITC enrollment in underserved neighborhoods?

Grant Classification
Please select – “Direct Service-Ready for Outcomes”

Primary Objective
Please select – “Objective 2 – 2021-2026: Secure benefits for low-income 50+”

Timeline
What is your timeline for project completion and the dates related to key project milestones? How might we transform tax filing (for safety net benefits) from an annual dreaded event to year-round engagement in underserved neighborhoods?

State Serviced Area(s)
Please enter the state(s) in which your project will operate.
Please note, for this grant AARP Foundation is focusing efforts in the following 22 U.S. states and territories: Alabama, Arizona, Arkansas, California, Florida, Georgia, Illinois, Kentucky, Louisiana, Michigan, Mississippi, New Mexico, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, Texas, West Virginia, the District of Columbia, and Puerto Rico

Population Served
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. If serving adults in multiple states, please include the estimated percentage of people served in each state.
Project Evaluation
Please share the metrics you will track and report. We are particularly interested in learning more about engaging non-filers to file their taxes and if they use AARP Foundation Tax-Aide or other filing assistance partners.

Participant Recruitment
Please explain your outreach efforts and how you will reach your projected population served and number of people served. How do you propose to build more trust in underserved neighborhoods for safety net programs? How will you engage local civic organizations and businesses to serve as influencers or delivery agents to help overcome the stigma of applying for and using safety net programs?

Organization Experience
Please share your current work in tax filing, EITC assistance, and your organization’s experience reaching non-filers.

D. Output and Outcome Metrics and Data Collection

Proposed People Served

Proposed People Served Explanation

Proposed Low-Income 50+ Served

Proposed Total Number of EITC Dollars*
Please project the total amount of EITC dollars that will be secured for low-income 50+ served

Describe How Numbers were Determined

Data Collection and Project Report Plan
Please describe how you will incorporate AARP Foundation demographic questions into your data collection practices and how you plan to report findings within the project that are relevant to AARP’s learning goals.

Direct from Participant?
Will you collect information about the amount of benefit ($s) from those you serve? Or will you rely on estimates and/or average benefit amount?

E. Financial Information

Proposed Project Budget

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).
Budget Narrative
Please provide a budget narrative. NOTE: AARP Foundation allows an indirect cost rate of up to 15% of total direct costs.

Application Budget*
To upload a document, click on the “Choose File” button. Once you have selected the file, click on “Open.” The file name should appear at the bottom of the box, beneath the “Choose File” and “Upload” buttons. Click the “Upload” button to attach the file to the report.
Detailed project budget (template)