Advancing Economic Opportunity among Older Adults—AARP Foundation Seeks Direct Service 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.

Required Pre-Application Deadline: April 15, 2022, 5:00pm ET

Invited Full Application Deadline: May 31, 2022, 5:00pm ET

AARP Foundation Grantmaking Overview

As AARP’s charitable affiliate, AARP Foundation works to end senior poverty by helping people over 50 build economic opportunity and maintain financial resilience. Through our grantmaking, we collaborate with organizations to advance equitable projects that can become sustainable solutions to the challenges facing older adults 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 — namely people over 50 who have low income. These objectives focus on increasing income/earnings, securing benefits and accessing refunds for this population and 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. AARP Foundation is focusing efforts in 22 U.S. states and territories: CA, FL, TX, NY, NC, MS, LA, PA, OH, GA, TN, AL, AR, KY, MI, SC, NM, WV, IL, AZ, DC and Puerto Rico.

AARP Foundation seeks direct-service projects that deploy program models with evidence of effectiveness for helping older adults with low income increase income/earnings or secure benefits. The following are examples of direct-service solutions with strong and consistent research/evidence showing their effectiveness for increasing economic opportunity among older adults with low income.

Pertaining to increasing income/earnings, this includes workforce programs that provide short term, affordable upskilling or reskilling opportunities, including work-based learning opportunities or other alternative pathways that help low wage older workers gain the skills and competencies for high quality employment in the fastest growing technology-driven sectors in the economy. Programs that support older workers seeking entrepreneurship or small business ownership will also be considered.

Pertaining to securing benefits, AARP Foundation is focused on a variety of benefits that help older adults support their health and wellbeing by reducing the financial burden of essential expenses,
such as healthcare, medicine, and food expenses. These specific benefits include the Supplemental Nutrition Assistance Program (SNAP), healthcare benefits such as the Medicare Savings Programs (MSP) and Extra Help, Paid Family Leave and Temporary Assistance for Needy Families (TANF).

AARP Foundation also seeks to support older workers through increased awareness and usage of state-administered Paid Family Leave programs, and to support older adults in reducing consumer debt burdens through participation benefit programs such as federal student loan Income Driven Repayment (IDR) programs. Innovative and effective benefit programs that help to reduce medical debt and fees/fines will also be considered. Proposed Direct-Service projects that assist older adults in applying for multiple benefits are of particular interest.

**Advancing Equitable, 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.

<table>
<thead>
<tr>
<th>Classification Definitions</th>
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<tbody>
<tr>
<td><strong>Direct Service</strong> Projects directly serving older adults with low income. Outputs (deliverables) and outcomes (changes observed at an individual, group, or systems-level as a result of the program or initiative) are regularly measured and reported. Direct service grant funding must be used to enhance direct services or projects/programs for older adults with low income.</td>
</tr>
<tr>
<td><strong>Ready to Pilot</strong>: 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 alternate locations and/or among older adults with low income.</td>
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<tr>
<td><strong>Ready for Outcomes</strong>: Program has been developed, pilot-tested and implemented among older adults with low income. A program/project evaluation was conducted that indicated older adult program participants achieved the program outcomes.</td>
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**Data Collection Requirements**

AARP Foundation is committed to collecting and using demographic data to help achieve equitable distribution of monetary outcomes, and as such, will require grantees to collect and report such data back to AARP Foundation. Direct Service applicants are required to clearly describe their program’s data collection abilities and plans by providing supporting documentation in the form of a theory of change with references to the literature, a logic model, and output and outcome data collection plans.

Direct Service grantees will be required to collect and report quarterly on the number of people and the number of people over 50 with low income served by their grant-funded project. AARP Foundation defines low-income as equal to or less than 250% of the HHS 2020 Federal Poverty Guidelines and rounds to the nearest 1000 for annual income for convenience, per the below chart:
<table>
<thead>
<tr>
<th>Household Size</th>
<th>Poverty level for 2020</th>
<th>250% of poverty level for 2020</th>
<th>250% of poverty level for 2020 (rounded to nearest 1000 for AARP Foundation use)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$12,760</td>
<td>$31,900</td>
<td>$32,000</td>
</tr>
<tr>
<td>2</td>
<td>$17,240</td>
<td>$43,100</td>
<td>$43,000</td>
</tr>
<tr>
<td>3</td>
<td>$21,720</td>
<td>$54,300</td>
<td>$54,000</td>
</tr>
<tr>
<td>4</td>
<td>$26,200</td>
<td>$65,500</td>
<td>$66,000</td>
</tr>
</tbody>
</table>

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, income as it relates to household size, race, ethnicity, disability and sexual orientation), Net Promoter Score (customer satisfaction), and project participant outcomes, such as dollar ($) increase in income or benefits.

**Reporting & Payment**

Award recipients will be required to submit calendar-year quarterly reports by the 8th of the month following the calendar year quarter (e.g. January 8th, April 8th, July 8th, and October 8th) 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**

AARP Foundation will prioritize applications that serve populations disproportionately impacted by systemic barriers, racial and ethnic disparities and other biases in programs and policies. Additionally, AARP Foundation will give priority to applications that serve older adults in at least one of 22 U.S. states and territories: CA, FL, TX, NY, NC, MS, LA, PA, OH, GA, TN, AL, AR, KY, MI, SC, NM, WV, IL, AZ, DC and Puerto Rico.

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**

AARP Foundation is committed to investing in equitable, effective projects to serve a significant number of older adults with low income. The final investment amounts will depend on a combination of factors including the number of older adults with low income the proposed project will serve over
the grant period, ability to apply an equity lens to the project, and the ability to collect, analyze and report outcomes.

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

<table>
<thead>
<tr>
<th>Application Components</th>
<th>Required Pre-Application</th>
<th>Invited Full Application</th>
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<tbody>
<tr>
<td>Narrative Sections</td>
<td></td>
<td></td>
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<tr>
<td>Contact</td>
<td>X</td>
<td></td>
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<tr>
<td>Organizational Details</td>
<td>X</td>
<td></td>
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<tr>
<td>Project Details (Pre-Application)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Details (Full-Application)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Financial Information</td>
<td>X</td>
<td></td>
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<tr>
<td>Outcomes Measurement</td>
<td>X</td>
<td></td>
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<tr>
<td>Attachments</td>
<td></td>
<td></td>
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<tr>
<td>Theory of Change</td>
<td>As applicable</td>
<td></td>
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<tr>
<td>Detailed project budget</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Most recent audited financial statements</td>
<td>X</td>
<td></td>
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<tr>
<td>Outputs Data Collection Table</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Outcomes Data Collection Table</td>
<td>X</td>
<td></td>
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<tr>
<td>Logic Model</td>
<td>X</td>
<td></td>
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<tr>
<td>Evaluation Reports</td>
<td>As applicable</td>
<td></td>
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</tbody>
</table>

**Grant Application Process**

The application will consist of two parts:

- Required pre-application: deadline April 15, 2021
- Invited full application: deadline May 31, 2021

Eligible applicants are invited to submit a pre-application that contains background about their organization, 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 funding opportunity. The full application will require additional information and supporting attachments.
The pre-application is located in Appendix A of this funding opportunity. *Please note: this funding opportunity is for Direct Service applicants only.*

All pre-applications and applications must be completed online in the [AARP Foundation Community Portal](https://community.aarp.org). The required pre-application deadline is April 15, 2022. Selected pre-applications will be invited to submit a full application due by May 31, 2022. [Click here to access the online pre-application.](https://community.aarp.org)

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](https://community.aarp.org). 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](https://community.aarp.org) 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 (via video conferences).

**Timeline**

- **March 2022:** Funding opportunity announced and online pre-applications made available
- **April 15, 2022, 5:00pm ET:** Required Pre-Application Deadline
- **Week of May 2nd, 2022:** Full Applications Invited
- **May 31, 2022, 5:00pm ET:** Invited Full Application Deadline
- **June 2022:** Clarification period (as needed)
- **July 2022:** Applicants notified of award decisions and funding determinations

**Contact**
For questions related to this funding opportunity or relating to pre-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: Pre-Application Questions

The pre-application allows you to provide basic 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 funding opportunity). Please be specific and concise.

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 (Pre-Application)

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

11. Objective
   Please select one:
   o Objective 1 - 2021-2026: Increase income and earnings for low-income 50+
   o Objective 2 - 2021-2026: Secure benefits for low-income 50+

12. Grant Classification
   Select one from list. See page 2 for definitions:
   o Direct Service-Ready to Pilot
   o Direct Service-Ready for Outcomes

13. Description of Proposed Project (5,000 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. Explain how your project aligns with AARP Foundation’s goals and objectives. Discuss your data collection and evaluation plans, such as how and what data you will collect for the project.

   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 older adults with low income 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 secure $3,000 annually in healthcare benefits).

15. Commitment to Equity (2,500 character limit).
   Please describe the proposed project’s commitment to achieving outcomes for populations that have faced systemic racism and discriminatory barriers. Please describe the population(s) that will be served and be specific in terms of age ranges, income levels, race, ethnicity and any other factors you wish to highlight. Please describe how your project will connect various groups of people served to the outcomes acheived. Please describe any systems in place to disaggregate people served by various demographic indicators and then connecting these to outcomes.

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