

Advancing Economic Opportunity among Older Adults—AARP Foundation Seeks 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.

Required Pre-Application Accepted on a Rolling Basis, Deadline: September 17, 2021, 5:00pm ET

Invited Full Application Deadline: October 15, 2021, 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, evidence-based 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 with evidence of effectiveness for helping older adults with low income increase income/earnings or secure benefits. To illustrate evidence of effectiveness, 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 that help low wage older workers gain the skills and competencies needed for high quality employment in the fastest growing technology-driven sectors in the economy. Programs that support low wage older workers, employed workers focused on family caregivers, workplace financial education, and retirement reforms (e.g. establishing an automatic IRA contribution) working with employers would also be considered.

Pertaining to securing benefits, we are focused on solutions that help older adults access: 1) public benefits (government benefits such as Supplemental Security Income (SSI), Social Security

Disability Income (SSDI), and Supplemental Nutrition Assistance Program (SNAP), low-income heating and energy assistance (LHEAP), Medicare, Medicare Savings Programs (MSP) and Medicaid), 2) private benefits (e.g. retirement, health care, and paid leave programs that are provided by employers) and 3) portable benefits (programs connected to an individual versus an employer, such as paid leave, retirement, disability and/or health insurance).

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 page 4).

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.

Classification Definitions	
Direct Service	<p>Projects directly serving older adults with low income that track outputs and outcomes. Direct service grant funding must be used to enhance direct services or projects/programs for older adults with low income.</p> <ul style="list-style-type: none"> • 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 older adults with low income. • Ready for Outcomes: 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.

Levels of Evidence

AARP Foundation will require invited 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.

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 [AmeriCorps’ 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.

Level of Evidence Definitions	
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 has been conducted on the program that was able to demonstrate improved outcomes among your participants.
Moderate	An independent evaluation has been conducted that had a well-implemented design with findings that support your program effectiveness, but with limited generalizability. There may have been a strong correlation between your 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 your program, OR one large well-implemented randomized controlled, multi-site study with findings that support the effectiveness of your program.

Data Collection Requirements

AARP Foundation is committed to collecting and using demographic data to advance increasingly equitable outcomes, and as such, will require grantees to collect and report such data back to AARP Foundation. Direct Service grantees will be required to collect and report year-to-date 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 2020 Federal Poverty Guidelines](#) and rounds to the nearest 1000 for annual income for convenience, per the below chart:

Household Size	Poverty level for 2020	250% of poverty level for 2020	250% of poverty level for 2020 (rounded to nearest 1000 for AARP Foundation use)
1	\$12,760	\$31,900	\$32,000
2	\$17,240	\$43,100	\$43,000
3	\$21,720	\$54,300	\$54,000
4	\$26,200	\$65,500	\$66,000

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, or ethnicity)**, **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 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 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 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.

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

AARP Foundation is committed to investing in equitable, effective projects to serve thousands 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, the strength of evidence of program effectiveness, 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.

	Application Components	
	Required Pre-Application	Invited Full Application
Narrative Sections		
Contact	X	
Organizational Details	X	

Application Components		
	Required Pre-Application	Invited Full Application
Project Details (Pre-Application)	X	
Project Details (Full-Application)		X
Financial Information		X
Evidence & Measurement		X
Attachments		
Theory of Change		X
Detailed project budget		X
Most recent audited financial statements		X
Outputs Data Collection Table		X
Outcomes Data Collection Table		X
Logic Model		X
Evaluation reports		As applicable

Grant Application Process

The application will consist of two parts:

- Required pre-application: deadline September 17, 2021
- Invited full application: deadline October 15, 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. There is a separate funding opportunity for Research, Education, Outreach, and Field-Building projects.*

All pre-applications and applications must be completed online in the [AARP Foundation Community Portal](#). The required pre-application deadline is September 17, 2021. Selected pre-applications will be invited to submit a full application due by October 15, 2021

[Click here to access the online pre-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 (via video conferences).

Timeline

August 2021: Funding opportunity announced and online pre-application made available

September 17, 2021, 5:00pm ET: Required Pre-Application Deadline

Week of September 27th, 2021: Full Applications Invited

October 15, 2021, 5:00pm ET: Invited Full Application Deadline

November 2021: Clarification period (as needed)

December 2021: 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**:

- Income & Earnings
- Benefits

12. Grant Classification

Select **one** from list. See page 2 for definitions:

- Direct Service-Ready to Pilot
- 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.

14. 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 secure an additional \$400 annually in Supplemental Nutrition Assistance Program (SNAP) benefits*).

15. Commitment to Equity (2,500 character limit).

Please describe the proposed project's commitment to achieving equitable outcomes for populations that have faced systemic racism and discriminatory barriers. For example, how will the project secure earnings or benefits consistent with their share of participants served and any relevant factors, such as education or experience? Describe your framework or methodology for measuring how your project will achieve equitable outcomes. Please describe the population that will be served and be specific in terms of age ranges, income levels, race, ethnicity and any other factors you wish to highlight.

****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.**