



# EngAGEment

## 2008 Request for Proposals

### EXECUTIVE SUMMARY

**Grantmakers In Aging (GIA)**, is dedicated to promoting and strengthening grantmaking for an aging society through education and collaboration. It is the only international professional organization of grantmakers active in the field. GIA's membership includes leading staff and trustees from all sizes and types of grantmaking organizations involved directly or indirectly with aging.

In 2005, with support from The Atlantic Philanthropies, GIA launched the **EngAGEment Initiative**, an Initiative designed to partner GIA with regional associations of grantmakers (Regionals) to introduce new grantmakers to the many needs of our aging population. With additional grant support, GIA is now seeking **to expand** this network of Regionals engaging in education and awareness activities designed to increase grantmaking focused on aging.

GIA is currently soliciting proposals from Regionals interested in planning, developing and implementing activities that encourage local area funders to take an active interest in aging issues. Successful applicants will receive up to \$30,000 in grant monies over two years from the Initiative and will be required to secure matching funds from local funders. Throughout the Initiative, grantees will have access to technical assistance, materials and networking meetings sponsored by GIA.

### BACKGROUND

The United States, and indeed the rest of the world, is experiencing a longevity revolution. Each month, there are an additional 800,000 older adults -- age 65 and above -- across the globe. Here at home, our older population is growing rapidly as well. The Census Bureau estimates that by 2030, the number of older Americans will double to approximately 70 million people or **20 percent** of the United States' population. This demographic shift has already begun to present numerous challenges and some associated opportunities for our communities.

### **Opportunities and Challenges**

Over coming decades, the aging of America's population will transform virtually all aspects of family and community life, requiring a broad range of personal, institutional and societal responses. On one hand, the growing number of older adults represents a powerful opportunity because they remain, as Marc Freedman of Civic Ventures has put it, "the only increasing natural resource" in our nation today. Communities, if properly

prepared, can benefit greatly from the growing number of elders, and the contributions they make. With support from local foundations, communities in Cleveland, OH, Winter Park, FL, Yonkers, NY, Phoenix, AZ to name a few, have already launched multi-faceted efforts to create “better communities for people of all ages,” seeking new ways for older adults to stay involved in, meet the needs of, and provide leadership to the towns and cities in which they live.

There are of course significant challenges for an increasingly growing population of aging adults. Communities will be faced with having to provide a broad range of supports for the relatively smaller, but extremely vulnerable group of older adults. While government entitlements have significantly reduced the rates of older adult poverty and increased the access of older adults to health care, as many as one-third of older adults face significant hardships – economic and housing insecurity, inadequate community health supports, isolation, lack of transportation, and in some of our poorest communities, even hunger.<sup>1</sup> Needed services for this “frail fraction” are by no means assured and will fall to the communities in which they live.

### ***Looking Ahead: Expanding Funding for Aging Issues***

Philanthropy, and especially local funders, is well-positioned to respond to the wide range of issues presented by a growing older population. Yet only **two percent** of current foundation funding is directed towards programs to support older Americans. For most Regionals, aging is not the primary focus of their member foundations.

Economic forecasts tell us that an unprecedented \$41 trillion intergenerational transfer of wealth will occur between 1990 and 2040, and that approximately 14 percent of inherited wealth will go to charity. Important efforts have already begun at the local level to introduce new donors to organized philanthropy around the country. Regional associations of grantmakers, through the Forum of Regional Associations of Grantmakers’ New Ventures in Philanthropy Initiative, have played a critical role in bringing new funders up to speed. Given the growing number of older adults and their effects on communities across the country, Grantmakers In Aging (GIA) would like to build on those efforts as they relate to older Americans.

GIA has been successful in engaging many larger funders already committed to aging. We have been able to attract foundations for which older adults are one of several priority funding areas. In contrast, we have had limited success recruiting smaller independent, community, family and corporate grantmakers. These local funders are often important conveners and planners in their community. They generally have close connections to the needs and concerns of their local constituencies. Their participation in the aging field is therefore critical if we hope to respond powerfully and effectively to the opportunities and the challenges associated with an aging population.

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<sup>1</sup> . According to a national survey conducted through the AdvantAge Initiative.

# EngAGEment

The **EngAGEment Initiative** is designed to attract new community, family, and private foundations; corporate grantmakers; and individual donors into philanthropy focused on aging. One of **EngAGEment's** main objectives is to increase potential funders' knowledge base about aging issues and effective grantmaking approaches. Over the last two years, GIA has partnered with six Regionals in this work. We are now seeking to expand that network to include an additional **six (6)** Regionals.

## **PROJECT CRITERIA**

GIA invites any member of the Forum of Regional Associations of Grantmakers to submit proposals for funding. To apply, applicants must:

- Convene an **EngAGEment** design team to be made up of four or more of its member grantmakers. Your proposal should clearly list the members of the design team, their title(s) and organizational affiliations.

There are no restrictions on the number or type of members that participate in the program. Members are not required to be involved with aging at the present time, but must be committed to helping older adults and this project. The proposed design team should be responsible for developing and overseeing the range of activities they believe best suited to educate and persuade the broader local funding community to take an active interest in philanthropy for our aging population.

- Describe proposed **EngAGEment** activities and the targeted audiences for these activities.

Examples of **EngAGEment** activities may include, but are not be limited to: guest speakers, educational workshops, site visits to local aging agencies, meetings with area foundations experienced in aging, forums to promote collaboration with others in the aging network, policy discussions or presentations, resource or material sharing, community summits on aging, and/or other similar measures.

Examples of targeted audiences for **EngAGEment** activities may include, but are not limited to: foundation executives, program officers, trustees, wealthy individuals, donor advisors and/or estate attorneys.

- Describe clear measurable outcomes for each year of the **EngAGEment** efforts (including broader community benefits) and a plan for evaluating the project.
- Provide a detailed project budget and demonstrated matching funds.  
As noted above, **EngAGEment** is a two-year initiative. GIA will provide \$15,000 annually (\$30,000 in total) to each of the selected sites. The grant money should be administered by the applying Regional.

A demonstrated commitment of matching funds from the Regional's member organizations is required. Financial partners, however, are not required to be participating members of the design team.

- Submit a letter of support from the regional association of grantmakers' Executive Director and Board Chair.

Preference will be given to projects that:

- Are advanced by a strong Regional with demonstrated ability to serve as a lead facilitator.
- Build on and strengthen proven outreach services to funders in the area, provide opportunities for peer-to-peer networking and resource sharing, and identify mechanisms to broaden the impact of activities beyond the foundations involved.
- Propose innovative outreach activities for aging issues.
- Recognize this work will require the time and attention of dedicated staff and is not merely an "add-on" to existing staff responsibilities.

### **SUPPORT, TECHNICAL ASSISTANCE AND MATERIALS**

GIA's experience working with new funders suggests that a personal connection to the knowledge, people, and ideas in the aging field is crucial. GIA will provide intensive, customized support for the activities planned and hosted by the participating Regional and their foundation partners.

In addition to providing funds to be matched by participating Regionals and their partner foundations, GIA will also provide technical assistance to each of the selected sites in the form of:

- Direct one-on-one telephone support;
- Quarterly conference calls for the sites' leadership to provide reinforcement and share expertise and best practices;
- A half-day pre-conference session at GIA's Annual Conference to share information and build leadership skills on October 29, 2008 in Princeton, NJ;
- Print and electronic outreach materials designed to help Regionals communicate the importance of funding;
- PowerPoint presentations that can be used by the sites to educate others about the aging field and the opportunities around funding in aging.

## **GRANTEE EXPECTATIONS**

The **EngAGEMENT Initiative** is committed to helping its grantees achieve their goals, and widely disseminating their findings and products.

Grantees are expected to participate in an ongoing learning network organized by the **EngAGEMENT Initiative** staff. Grantees will be asked to send a representative to GIA's Annual Conference to report on their progress at a special pre-conference session and share their best practices and products with fellow grantees and others. For budgeting purposes, please note that the **EngAGEMENT Initiative** budget covers travel costs to the conference for one (1) representative from each grantee coalition.

## APPLICATION PROCEDURE

The proposal narrative should briefly and concisely include the following information in the order and manner described below.

### SECTION I:

#### 1. Cover Sheet (separate page)

A cover sheet should include the legal title of the organization, address, telephone number, fax number, e-mail address, contact person, signature of an authorized officer, and names and contact information for participating member foundations. All correspondence from Grantmakers In Aging will be sent to the identified contact person.

#### 2. Organizational Description

Include a history of the organization; its stated mission and goals, and how the proposal supports them. Describe the administrative structure that will support the proposed project, including key relationships with other agencies or institutions. Discuss how your organization will address cultural and language issues (if any) in project implementation. Highlight relevant accomplishments during the past two years, in addition to current projects.

#### 3. Project Description

Please provide a description of each component of the project as follows:

##### Identify the Design Team

- A. Identify the members of the design team, their title(s) and organizational affiliations

##### Explain the Project

- A. Briefly describe the target audiences for the project and the rationale for selection.
- B. List project goals, objectives, and activities:

- a. **Goals** are broad descriptions of what you want to accomplish and typically do not include specific measurements.
- b. **Objectives** are narrower than goals and describe what you want to accomplish; they are typically explicit and measurable.
- c. **Activities** are well-defined tasks and actions, with assignments, timelines, and measures that you undertake in pursuit of the goals and objectives.

- C. Indicate what constitutes success and how you will measure it.

##### Sustainability

- A. Provide a description of how the project will have impact beyond the grant period.

**Evaluation:**

GIA will provide a template for organizing evaluation plans so that comparative information will be collected from all sites.

- A. Explain the anticipated outcomes of your project and how you will evaluate whether or not the project was successful.
- B. Provide a timeline for your evaluation.
- C. List the name and contact information of the person who will be responsible for the evaluation piece of **EngAGEment**.

**SECTION II**

**1. Financial Information (separate page)**

- A. Please provide a basic budget outline, describing both income and expenses, including any in-kind support. (A basic budget outline is attached.)
- B. Grantmakers In Aging requires a total matching grant of \$15,000 for each year of the Initiative from the Regional's member organization(s). If additional funds or in-kind support is generated, please document the amounts and how those funds will be allocated.

Please submit:

- ◆ One original of the grant proposal and attachments
- ◆ One copy of the audit, operating budget and 501(c)(3) letter

The proposal should be typed on 8 ½ x 11 paper, single-spaced, with a font size no smaller than 12 point and margins at least one inch around each page.

Do not bind or place proposal in notebooks.

Full proposals will be accepted as hardcopy or electronic version.

Faxed proposals will not be accepted.

These materials and all supporting documents should be sent to:

**Grantmakers In Aging  
EngAGEment Initiative  
7333 Paragon Road, Suite 220  
Dayton, OH 45459**

**DEADLINE**

Applications must be postmarked by **April 25, 2008**.

Grant awards will be announced by **June 4, 2008**.

## **CONTACT INFORMATION**

If you have any questions about **EngAGEment**, please contact:

Jennifer Gross

Acting National Project Director – EngAGEment Initiative

[jbgconsulting@yahoo.com](mailto:jbgconsulting@yahoo.com)

*Grantmakers In Aging*

# EngAGEment Initiative

REQUEST FOR PROPOSALS

**Project Funding Period**  
June 15, 2008 – June 14, 2009

Organization name: \_\_\_\_\_

<b>Budget Category</b>	<b>GIA Support</b>	<b>Regional Support</b>	<b>In-Kind</b>	<b>Total</b>
<b>PERSONNEL</b> (job titles)				
Subtotal Personnel				
<b>OPERATIONS</b>				
Supplies and materials				
Printing and copying				
Telephone				
Postage				
Staff Travel				
Meeting expense				
Marketing				
Subtotal Operations				
Other (please specify)				
<b>TOTAL BUDGET</b>	<b>\$15,000</b>			

**MATCHING FUNDS:**

Please list name of organization, address, and amount of money (or in-kind)

- 1.
- 2.
- 3.
- 4.
- 5.

*Grantmakers In Aging*

# EngAGEment Initiative

REQUEST FOR PROPOSALS

**Project Funding Period**

June 15, 2009 – June 14, 2010

Organization name: \_\_\_\_\_

<b>Budget Category</b>	<b>GIA Support</b>	<b>Regional Support</b>	<b>In-Kind</b>	<b>Total</b>
<b>PERSONNEL</b> (job titles)				
Subtotal Personnel				
<b>OPERATIONS</b>				
Supplies and materials				
Printing and copying				
Telephone				
Postage				
Staff Travel				
Meeting expense				
Marketing				
Subtotal Operations				
Other (please specify)				
<b>TOTAL BUDGET</b>	<b>\$15,000</b>			

**MATCHING FUNDS:**

Please list name of organization, address, and amount of money (or in-kind)

- 1.
- 2.
- 3.
- 4.
- 5.