Enterprise

Thome Aging Well Program
Scale What's Working: Round II Grant Awards
2023 Request for Proposals

Important Dates

Request for Proposal Release	March 2, 2023
Informational Webinar	March 14, 2023, 3 – 4 pm EDT
Virtual Office Hours	March 21, 2023, 10 – 11 am EDT
	March 23, 2023, 1 – 2 pm EDT *(Built Environment Track Only)*
	March 30, 2023, 2 – 3 pm EDT
Submission Deadline for Proposals	April 14, 2023, by 11:59 pm EDT
Notice of Awards	On or about June 30, 2023

Overview of Opportunity

The purpose of the second round of the Thome Aging Well Program's Scale What's Working grant opportunity is to improve the health and well-being of older adults with lower incomes in Michigan and Maryland. This will be done through the award of up to $6 million in grants to eligible organizations operating in Michigan and Maryland. Grant awards will range in size from $75,000 to $300,000 depending on applicant needs and projected impact. Awards may be used to either scale (1) successful housing and community-based services programs or (2) built environment modifications that enable older adults to age safely in their homes and community.

Background

The mission of Enterprise Community Partners (Enterprise) is to make home and community places of pride, power and belonging, and platforms for resilience and upward mobility for all. Enterprise launched the Thome Aging Well Program at the start of 2022 with funding from the Edward N. & Della L. Thome Memorial Foundation, Bank of America trustee. The Program is designed to improve the health and well-being of older adults with lower incomes by supporting organizations dedicated to:

- Helping these individuals age with dignity at home
- Innovating programs
- Sharing knowledge across a rich partner network

Round I of Scale What's Working grants were awarded in the summer of 2022.

Scale What's Working: Round II Grants

Round II of Scale What's Working grants, the focus of this RFP, is open to the following list of organizations operating in Maryland and Michigan that provide a full range of services and supports to enable older adults with lower incomes to age safely in their homes and community.

- Non-profit or community organizations holding a tax-exempt status under Section 501c3 organization or
- Organizations that are fiscally sponsored by a 501c3 organization or
- Recognized governmental entities including state, county, or city agencies such as a health department, area agency for aging, etc. or
- Tribal Housing Authorities or Tribal Designated Housing Entities (TDHE)

Previous Thome Scale What's Working Grantees are **NOT** eligible to apply for Round II of the Scale What's Working grants.

For the purposes of this RFP, we are especially interested in supporting organizations that plan to scale their existing work. Enterprise defines scaling as follows:

- Scale up: Increase the number of people served within an existing program site or geographic focus area;
- Scale out: Expand an existing program to serve new sites or geographies;
- Scale deep: Increase the intensity (i.e., frequency, accessibility, quality, or quantity) of services or supports provided to existing populations or geographies.

Organizations wishing to scale successful solutions may apply to one of two tracks: **Programs** OR **Built Environment**. The **Programs Track** includes housing- or community-based supports and services that foster improved social engagement; productive aging; emotional well-being; and financial, physical, and mental health. The **Built Environment Track** includes supports and services that modify the physical environment in which a person lives to enhance their ability to age in place.

Period of Performance:

Grants funded through this opportunity will have a duration of 24 months. Grants will start on the date the agreement is executed by both parties, but no earlier than July 1, 2023.

Core Values

Core to our work at Enterprise and to the Thome Aging Well program is a focus on racial equity, authentic community engagement, and evidence-based practice. We are especially interested in proposals that include the following in their design and implementation:

- Older adult voice and leadership
- Demonstrated commitment to diversity, equity and inclusion and addressing or accommodating differences with respect to culture, race, language and/or ability.
- Community partnerships
- Continuous improvement in response to the changing needs of the population served.

Scale What's Working: Round II Awards

All grantees in Round II of the Scale What's Working phase of the program will receive the following:

- **Award**: Individual grant awards will range from $75,000 to $300,000. Up to $6 million total will be awarded in this grantmaking round. Eligible and ineligible grant expenses are specified in Appendix B.

- **Evaluation Support**: All grantees will receive up to 15 hours of optional in-kind technical assistance from a third-party evaluator to support their specific evaluation needs. The focus and format of the technical assistance will be determined by the grantee and evaluator and may include activities such as articulating a theory of change, designing data collection approaches, or communicating findings to stakeholders. Support may be offered individually or in a group setting.
- **Learning Collaborative**: All grantees will participate in a learning collaborative during their grant period. The curriculum for the learning collaborative will focus on health equity, collective problem-solving and knowledge-sharing. The learning collaborative will meet quarterly for three 2-hour virtual meetings. There will be one in-person convening each year and grantees are expected to build in travel costs for at least one staff member to travel to Baltimore, Maryland once during the period of performance.
- **Funders Convening**: Grantees will be offered the opportunity to attend a funders convening to network with funders in the field, share their success, and make the case for continued support of their work.

Grantees in the **Built Environment Track** will have the option to develop a health action plan to guide their built environment modifications. This will include in-kind technical assistance with a public health professional and three working sessions in the Fall of 2023 to support the development of the health action plan. Additionally, grantees choosing to participate in the development of a health action plan can apply for up to an additional $50,000 to fund priority modifications to the built environment identified through the health action plan process.

Eligibility Requirements

All proposals must meet the following eligibility requirements to be considered.

A checklist version of this chart is available as a separate document in Appendix E.

I. ELIGIBLE APPLICANTS
Organizations are eligible for funding as an individual applicant or as the lead applicant for a group of partner organizations if they meet the following criteria. **NOTE:** Previous Thome Scale What's Working Grantees are **NOT** eligible to apply for Round II of the Scale What's Working grants.
The applicant or lead applicant is one of the following entities: - Non-profit or community organization holding a tax-exempt status under Section 501c3 organization or   - Is fiscally sponsored by a 501c3 organization or   - Is a recognized governmental entity including state, county, or city agencies such as a health department, area agency for aging, etc. or   - Is a Tribal Housing Authority or Tribal Designated Housing Entity (TDHE)
II. ELIGIBLE PROPOSALS
Proposals are eligible for funding through this grant opportunity if they meet the following criteria:
Population Served   The proposed grant funds must be used to serve (all criteria must be met):   - Older adults who are aged 55 or older   - Older adults with household incomes that are 80% AMI or lower   - Older adults who live in Michigan or Maryland

Preference will be given to proposals that request funding to support those who belong to a community or group that has and is continuing to experience persistent health inequities. This may include the following:
- Black, Indigenous, and People of Color
- Extremely low income (30% of AMI or lower)
- Persons with disabilities
- LGBTQ+ populations
- Other (please describe)

Implementation
Grantee is prepared to begin serving the proposed population within **3 months** of the start of the grant period of performance.

III. PROPOSAL AREAS
Grantees must select an application track based on their proposal's alignment with the definitions below. Proposals should fall into one of the two proposal tracks: (A) **Programs** OR (B) **Built Environment**.

Programs Track:
Proposals in this track must provide services and/or supports that have proven successful in improving outcomes related to one or more of the following:
- **Social Engagement** (e.g.**,** civic engagement, leadership, intergenerational programs, arts and cultural programs, transportation)
- **Emotional Wellbeing** (e.g., grief support, end-of-life planning, spiritual education, community outreach)
- **Productive Aging** (e.g., employment, skills training, benefits counseling, technology training, self-advocacy)
- **Physical Health** (e.g., exercise and movement, chronic disease management, health screenings and treatment, medication management, nutrition counseling)
- **Mental Health** (e.g., substance misuse treatment, improvement of cognitive performance, stress management, management of mental health diagnoses or early warning signs)
- **Financial Health** (e.g., financial literacy, debt and credit counseling, tax preparation, legal services, estate planning)

Built Environment Track:
Proposals in this track must use grant funds to modify the built environment in:
- **Single-family housing improvements** (e.g., roof repairs and other minor home repairs; mold and mildew remediation; accessibility enhancement, including grab bars, entryway repairs, wheelchair ramps, lighting))
- **Multi-family housing improvements** (e.g., security and safety improvements, navigational cues and accessible pathways, exercise areas, community gardens)

How to Apply:

Applicants must apply through SlideRoom, the submission portal for this funding opportunity, by **11:59 pm Eastern Daylight Time (EDT) on April 14, 2023**. No exceptions will be made.

- Apply here: Application Link
- If you need to, register for a SlideRoom account here under your organization's name.

Technical issues with SlideRoom can be sent to support@slideroom.com or by accessing the online help desk: https://support.slideroom.com/. SlideRoom support can take up to 24 hours; for this reason, we encourage applicants to apply and submit their applications early.

Webinar:

Enterprise will host a webinar on the date shown below. During this session, Enterprise staff will review the requirements of the grant opportunity and answer questions from potential applicants.

> Date and time: March 14, 2023, 3 – 4 pm EDT (registration link)

This webinar will be recorded for those who cannot attend. To request a copy of the webinar recording after the session, please e-mail AgingWell@enterprisecommunity.org.

Office Hours:

Enterprise will host three 1-hour office hour sessions for potential applicants. During these sessions, an Enterprise representative will be available to answer clarifying questions around the grant opportunity. Enterprise will not provide personalized support to applicants in completing their applications. These sessions will be held on:

March 21, 2023, 10 – 11 am EDT (registration link)

March 23, 2023, 1 – 2 pm EDT **Built Environment Track Only** (registration link)

March 30, 2023, 2 – 3 pm EDT (registration link)

Questions

General questions may be submitted to AgingWell@enterprisecommunity.org until 3 p.m. EDT Friday, April 14, 2023. We will share a list of frequently asked questions through our website periodically before the application deadline. Questions received after this time and date will not be answered. Enterprise highly recommends proposals be submitted in advance of the deadline.

Application Process and Overview

Completed applications submitted by the April 14th deadline will be reviewed by Enterprise staff from across the organization. After reviewing and scoring all applications, there will be a period of electronic Q&A, as necessary, to gather any additional clarifications or information needed to make the final selection. We reserve the right to request a virtual interview with key organization staff prior to award.

The application questions (see Appendix A for full copy of application) are organized into the following categories, totaling 100 possible points.

- I.   Organizational Information
- II.   Proposal Overview (30 points)
- III.   Core Values (15 points)
- IV.   Population Served (25 points)
- V.   Expected Impact (20 points)
- VI.   Financial and Organizational Information (10 points)

II. APPLICATION ATTACHMENTS
All attachments detailed below are required unless otherwise stated.
A. Budget Attachments
• Budget template (download template here)

- Documentation of Indirect Rates – if including indirect costs in the budget proposal, please submit documentation of your organization's approved indirect rate or explanation of the indirect costs

B. Evidence-Base Attachment

All applications must illustrate that the proposed program or built environment modification is based on proven strategies. Applications must include **one attachment** that demonstrates one or more of the following types of evidence:
- Case studies or program participant or staff narratives or testimonials that illustrate the impact of proposed activities on the lives of current participants served.
- Outcome data to illustrate program effectiveness. *Outcome data examples include participant self-reported physical or mental health status, activity levels, consumption of healthy foods, access to primary care, etc.*
- Program performance data (e.g., tracking program outputs). *Performance data examples include frequency and type of services delivered, people served, program attendance, etc.*
- The proposed program has been successfully implemented with older adults and is based on best practices as illustrated by white papers, program evaluations, published reports and/or peer-reviewed literature.

C. Impact Video

Applications must include a video that illustrates the need for your proposed program or built environment modifications. The video may include testimonials from impacted community members, statements from partner organizations, evidence of needed building improvements, etc. Applicants may submit previously produced videos; however, videos need not be formally produced. Submitted videos should run **NO MORE** than 5 minutes.

D. Financial and Organizational Attachments – To illustrate eligibility

- 501c3 Letter of Determination
    - Applicants must have 501c3 status at the time the proposal is submitted. A pending application to secure 501c3 nonprofit status will not be accepted as a substitute. For housing authorities that are not organized as a 501c3 entity or for tribal designated housing entities, please provide documentation related to tax status or authorized formation or designation.
- Signed Enterprise Standard Terms and Conditions (download [here](#))
    - Applicants must provide a signed Standard Terms and Conditions page. Signatures must include the organization's board president and Chief Executive Officer, Executive Director, General Partner, or Managing Member.
- Audited Financial Statements
    - Lead Applicants must provide their most recent audited financial statements. If your organization does not have audited financial statements, please submit company certified financial statements.
- State Issued Certificate of Good Standing
    - Applicants must provide a recent (within 30-days) state certificate of good standing. Organizations that are not in good standing will not be considered.
- IRS W-9, completed and signed
- Memoranda of Understanding or Agreement
    - If applying as a group, the application must include a formal written partnership agreement clearly outlining roles and responsibilities of all partners involved.

Curable Deficiencies

After the application deadline, any curable deficiencies identified by Enterprise will be shared with the applicant's authorized representative by email. This email is the official notification of a curable deficiency and will include detailed instructions about correcting it. A curable deficiency is an error or

oversight that, if corrected, would not alter, in a positive or negative fashion, the review and rating of the application. Examples of curable (correctable) deficiencies include inconsistencies in the funding request and failure to submit required certifications. These examples are non-exhaustive.

Recommendations of Award

Between June 5–16, 2023, Enterprise will reach out with any clarifying questions to applicants as needed. These clarifications will inform scoring adjustments as applicable. This communication will be sent via email. **Receiving or not receiving outreach during this time is not an indication of potential success.**

On or about June 30, 2023, grantees will receive notification of an award. Recommendation of award and declination letters will be sent via email. Recommendation of Award letters are provided as a statement of interest in developing a grant agreement with the selected organization. They are not legally binding documents or official agreements. Receiving the award is contingent upon (1) the development of a mutually agreed upon scope of work, outcomes, and budget and (2) successful completion of the financial and organizational review process. Awardees that fail to provide information within the requested time frame will have their Recommendation of Award rescinded.

Appendix A: Copy of Application
Application

Organization Information

- Organization:
- Address:
- Website:
- Organization Type: (Options: Non-profit or community organization holding a tax-exempt status under Section 501c3 organization, is fiscally sponsored by a 501c3 organization, is a recognized governmental entity including state, county, **or** city agencies such as a health department, area agency for aging, etc., is a Tribal Housing Authority or Tribal Designated Housing Entity (TDHE)
- Please select the states with populations served by your organization. (Options: Maryland, Michigan, Michigan and Maryland)
- How many years has your organization been in business?
- How many unique or unduplicated adults aged 55 and older did your organization serve between January 1 and December 31, 2022?
- Please indicate the total organization annual operating budget as of December 31, 2022.
- Which of the following best describes the race and ethnicity of your organization's Chief Executive Officer, Executive Director, General Partner, or Managing Member?
- Which best describes the gender of your organization's Chief Executive Officer, Executive Director, General Partner, or Managing Member?
- Do more than 50% of your organization's board members identify as Black, Indigenous, or as People of Color (BIPOC)?
- Does the Chief Executive Officer, Executive Director, General Partner, or Managing Member of your organization identify as a member of the LGBTQ+ community?
- **Built Environment Track Only**: If awarded, would your organization plan to participate in the optional health action plan and learning sessions? (Please see Scale What's Working: Round II Awards for additional context) (Options: Yes, No, N/A)

Contact Information

- Primary Contact First & Last Name:
- Primary Contact Title:
- Primary Contact Phone:
- Primary Contact E-mail:
- Secondary Contact First & Last Name:
- Secondary Contact Title:
- Secondary Contact Phone:
- Secondary Contact E-mail:

Partner Information

List the following information **for each** partner organization included in the proposal (if applicable).

- Name of Partner Organization:
- Address of Partner Organization:
- Primary Contact First & Last Name:
- Primary Contact Title:
- Primary Contact Phone:
- Primary Contact E-mail:

Proposal Overview (30 points)

1. *Select your proposal track from the drop down. (Options: "Programs," or "Built Environment")*
2. *Share your proposed goal. The goal should be SMART (specific, measurable, achievable, relevant, and time-sensitive) (1500 characters).*
3. *Describe your planned activities along with a detailed timeline. (4000 characters)*
4. *Detail your staffing plans. Indicate if you will need to hire new staff to carry out your proposed activities. If new staff are required, share your hiring plan and contingency plan in case of hiring delays. (3000 characters)*
5. *Submit a video that illustrates the need for your proposed activities. (5 minutes or less)*
6. *Insert one attachment to illustrate the evidence base that supports your proposal. A description of eligible attachments is provided in the RFP in Chart II Application Attachments.*

Core Values (15 points)

7. *Describe how the proposal identifies opportunities for older adults with lived experience to play a meaningful role in the design, implementation, and outcome of the proposed activities. (1500 characters)*
8. *Describe how the proposed activities either address or accommodate differences with respect to culture, race, language and/or ability. (1500 characters)*
9. *Describe how the proposal outlines ways in which the proposed activities will leverage partnerships between organizations committed to enabling older adults with lower incomes to age in place. (1500 characters)*
10. *Describe how the proposal outlines specific methods for gathering feedback on how the proposed activities are meeting the needs of the population served. (1500 characters)*

Population Served (25 points)

11. *Please list the counties that will be served by the proposed activities. (2000 characters)*
12. *If you serve a smaller geography within a county, please indicate it here (e.g., incorporated townships, villages, cities, or sub-sections thereof.) (2000 characters)*
13. *Describe the resident population you will serve, including age, income range, race/ethnicity, prevalent languages spoken, and any other relevant characteristics. Priority populations are described in the "Eligible Proposals" section of the RFP. (2000 characters)*
14. *Summarize the need(s) for the proposed activities. We encourage you to provide data in your description. Data may include statistics, study results, other information from neutral and*

reliable sources, and/or your own organization's surveys and/or needs assessments. (3000 characters)

15. *Describe the consequences should your proposal not be funded. Include any factors that could potentially increase community need (e.g., the elimination of benefits, increased climate events, etc*.) *(3000 characters)*

Expected Impact (20 points)

16. *Describe how you plan to scale your current activities using the following definitions: (1) Scaling Up: Increasing the number of people served within an existing program site or geographic focus area; (2) Scaling Out: Expanding an existing program to serve new sites or geographies; (3) Scaling Deep: Increasing the intensity (i.e., frequency, accessibility, quality, or quantity) of services or supports provided to existing populations or geographies; or (4) We define our project scaling differently (please specify). Provide details including your expected outcomes and proposed number of people served. (3000 characters)*

17. *Explain how you will ensure that the proposed activities meet the needs of your targeted population. (2200 characters)*

18. *Describe how the population served will continue to benefit from the proposed activities once the grant has ended. Some examples may include built environment modifications, partnerships, resident or staff training. (2200 characters)*

Financial and Organizational Information (10 points)

19. *Complete and attach the budget template (download template here).*

20. *Attach 501c3 Letter of Determination. Applicants must have 501c3 status at the time the proposal is submitted. A pending application to secure 501c3 nonprofit status will not be accepted as a substitute. For government entities that are not organized as a 501c3 entity or for tribal designated housing entities, please provide documentation related to tax status or authorized formation or designation.*

21. *Attach signed Enterprise Standard Terms and Conditions (download template here). Applicants must provide a signed copy of Enterprise's Standard Terms and Conditions. Signatures must include the organization's board president and Chief Executive Officer, Executive Director, General Partner, or Managing Member.*

22. *Attach Audited Financial Statements. Applicants must provide their most recent audited financial statements. If your organization does not have audited financial statements, please submit company certified financial statements.*

23. *Attach IRS W-9. Must be completed and signed.*

24. *Attach signed Memoranda of Understanding or Agreement. If applying as a group, the group must have a formal written partnership agreement in place clearly outlining roles and responsibilities of all partners involved.*

25. *Attach a State Issued Certificate of Good Standing. Applicants must provide a recent (within 30-days) state certificate of good standing. Organizations that are not in good standing will not be considered.*

Appendix B: Eligible and Ineligible Expenses

Eligible Expenses

The grant dollars must be used to directly serve populations with lower incomes (defined as 80% Area Median Income or below), particularly those who have and are continuing to experience health inequities, who are aged 55 or older, and who reside in Michigan or Maryland. Specifically, grant funds may be used for activities which include, but are not limited to:

- Staff time associated with delivering proposed activities, including the hiring of necessary staff and contractors/consultants (e.g., resident services coordinator, benefits navigators, exercise instructors, financial counselors, etc.).
- Costs associated with hiring contractors or consultants to deliver the proposed activities.
- Costs associated with built environment modifications to single- or multi-family properties that have a clear impact on older adults' ability to age safely in their home or community. This may include the costs of contractors, consultants, or supplies required to complete the defined modifications.
- Travel expenses directly related to the delivery of program activities and those related to participation in the Thome Aging Well Learning Collaborative and Funders Convening. There will be one in-person convening each year and grantees are expected to build in travel costs for at least one staff member to travel to Baltimore, Maryland once during the period of performance**.**
- Technology hardware, software, and equipment.
- Professional development and training for staff and/or residents to support proposed goals, activity delivery, or intended outcomes, including costs to attain additional certifications (e.g., healing-centered property management training, CARES Dementia Certification).
- Supplies, materials, or other costs including resident incentives associated with proposed activities.
- Indirect costs should not exceed the approved organization indirect rate for your organization. If your organization does not have an indirect rate, indirect costs should not exceed 10%.

Ineligible Expenses - Grant funds **may not** be used to cover the following costs:

- Ongoing business expenses or organization costs defined as rent, phone bills, insurance, etc.
- Fundraising activities
- Dues for lobbying activities
- Bad debts
- Contributions and donations
- Policy or advocacy costs intended to influence legislation
- Fines, penalties, and judgments
- Interest and other financing costs
- Investment costs

- Capital expenditures for land acquisition, pre-development costs, etc.
- Costs of idle facilities
- Housing & personal living expenses
- Contingency reserves
- Other costs pursuant to program or regulatory requirements
- Direct payments to homeowners or landlords for the purposes of built environment modifications
- Direct payments to homeowners or landlords to offset rent, mortgage, or tax arrears

Appendix C: Grant Disbursement & Reporting

Period of Performance:

Grants funded through this opportunity will have a duration of 24 months. Grants will start on the date the agreement is executed by both parties, but no earlier than July 1, 2023.

Grantees will receive half of the grant amount at the start of the period of performance and the second half at the mid-point of the period of performance. As part of their grant agreement, they will be expected to:

- Execute the proposed activities.
- Provide an annual report to Enterprise detailing progress, successes and challenges; basic output and outcome reporting, including the type of services delivered and the number of older adults served; and an accounting of use of funds. Additional guidance on the content of the annual report will be developed with Enterprise's Thome Aging Well Program Team.
- Participate in quarterly check-ins with Enterprise's State Program Director for the period of performance for the grant.
- Participate in all meetings, to the extent possible, of the learning collaborative through at least the end of the period of performance for this grant.
- Contribute to Enterprise's efforts to assess key outputs or outcomes for this funding opportunity and to gather lessons learned to inform the field and future programming. This may include sharing limited output or outcome data with Enterprise or participating in surveys or a focus group to further reflect on aspects of your program implementation (e.g., grantee's experiences, lessons learned, successes and limitations). Such engagement may be conducted by Enterprise staff or by a third-party evaluation consultant.

Appendix E: Eligibility Requirements and Attachments Checklists
(Optional and for Applicant's Use Only)

All proposals must meet the following eligibility requirements to be considered. Please read through each section carefully to ensure that your organization fulfills all the RFP requirements outlined below.

As a courtesy, we have provided checkboxes next to each requirement to help applicants keep track of their application progress. While all requirements must be met, the use of the checkboxes is optional and for the applicants' use only.

I. ELIGIBLE APPLICANTS Organizations are eligible for funding as an individual applicant or as the lead applicant for a group of partner organizations if they meet the following criteria. **NOTE:** Previous Thome Scale What's Working Grantees are **NOT** eligible to apply for Round II of the Scale What's Working grants.	
	The applicant or lead applicant is one of the following entities: - Nonprofit or community organization holding a tax-exempt status under Section 501c3 organization or - Is fiscally sponsored by a 501c3 organization or - Is a recognized governmental entity including state, county, or city agencies such as a health department, area agency for aging, etc. or - Is a Tribal Housing Authority or Tribal Designated Housing Entity (TDHE)
II. ELIGIBLE PROPOSALS Proposals are eligible for funding through this grant opportunity if they meet the following criteria:	
A. Population Served (All Criteria Must Be Met)	
	1. Older adults who are aged 55 or older
	2. Older adults with household incomes that are 80% AMI or lower
	3. Older adults who live in Michigan or Maryland
Preference will be given to proposals that request funding to support those who belong to a community or group that has and is continuing to experience persistent health inequities. This may include the following including:	
	4a. (Optional) Black, Indigenous, and People of Color (BIPOC)
	4b. (Optional) Extremely low incomes (30% of AMI or lower)
	4c. (Optional) Persons with disabilities
	4d. (Optional) LGBTQ+ populations
	4e. (Optional) Other (Please describe)
B. Implementation	
	Grantee is prepared to begin serving the proposed population within **3 months** of the start of the grant period of performance.
III. PROPOSAL AREAS Grantees must select an application track based on their proposal's alignment with the definitions below. Proposals should fall into one of the two proposal tracks: A) <u>Programs</u> OR B) <u>Built Environment</u>.	
	Programs Track: Proposals in this track must provide services and/or supports that have proven successful in improving outcomes related to one or more of the following: **Social Engagement** (e.g.**,** civic engagement, leadership, intergenerational programs, arts and cultural programs, transportation) **Emotional Wellbeing** (e.g., Grief support, end-of-life planning, spiritual education, community outreach)

	• **Productive Aging** (e.g., employment, skills training, benefits counseling, technology training, self-advocacy) • **Physical Health** (e.g., exercise and movement, chronic disease management, health screenings and treatment, medication management, nutrition counseling) • **Mental Health** (e.g., substance misuse treatment, improvement of cognitive performance, stress management, management of mental health diagnoses, or early warning signs.) • **Financial Health** (e.g., financial literacy, debt and credit counseling, tax preparation, legal services, estate planning.)
	Built Environment Track Proposals in this track must use grant funds to modify the built environment in: • **Single-family housing improvements** (e.g., roof repairs and other minor home repairs; mold and mildew remediation; accessibility enhancement, including grab bars, entryway repairs, wheelchair ramps, lighting.) • **Multi-family housing improvements** (e.g., security and safety improvements, navigational cues and accessible pathways, exercise areas, community gardens.)

Application Attachments Checklist

II. APPLICATION ATTACHMENTS All attachments detailed below are required unless otherwise stated.	
A. Budget Attachments	
	1. Budget template (download template here)
	2. Documentation of Indirect Rates – if including indirect costs in the budget proposal, please submit documentation of your organization's approved indirect rate or explanation of the indirect costs
B. Evidence-Base Attachments	
	All applications must illustrate that the proposed program or built environment modification is based on proven strategies. Applications must include **one attachment** that demonstrates by one or more of the following types of evidence: • Case studies or program participant or staff narratives or testimonials that illustrate the impact of proposed activities on the lives of current participants served. • Outcome data to illustrate program effectiveness. *Outcome data examples include participant self-reported physical or mental health status, activity levels, consumption of healthy foods, access to primary care, etc.* • Program performance data (e.g., tracking program outputs). *Performance data examples include frequency and type of services delivered, people served, program attendance, etc.* • The proposed program has been successfully implemented with older adults and is based on best practices as illustrated by white papers, program evaluations, published reports and/or peer-reviewed literature.
C. Impact Video	
	Applications must include a video that illustrates the need for your proposed program or built environment modifications. The video may include testimonials from impacted community members, statements from partner organizations, evidence of needed building improvements, etc. Applicants may submit previously produced videos; however, videos need not be formally produced. Submitted videos should run **NO MORE** than 5 minutes.

D. Financial and Organizational Attachments – To illustrate eligibility	
	• 501c3 Letter of Determination • Lead Applicants must have 501c3 status at the time the proposal is submitted. A pending application to secure 501c3 nonprofit status will not be accepted as a substitute. For housing authorities that are not organized as a 501c3 entity or for tribal designated housing entities, please provide documentation related to tax status or authorized formation or designation.
	• Signed Enterprise Standard Terms and Conditions page (download [here](#)) • Lead applicants must provide a signed Standard Terms and Conditions page. Signatures must include the organization's board president and Chief Executive Officer, Executive Director, General Partner, or Managing Member.
	• Audited Financial Statements • Lead Applicants must provide their most recent audited financial statements. If your organization does not have audited financial statements, please submit company certified financial statements.
	• State Issued Certificate of Good Standing • Lead Applicants must provide a recent (within 30-days) state certificate of good standing. Organizations that are not in good standing will not be considered.
	• IRS W-9 • Must be completed and signed.
	• Memoranda of Understanding or Agreement. • If applying as the lead applicant of a group, the application must include a formal written partnership agreement clearly outlining roles and responsibilities of all partners involved.