



## **Request for Proposal (RFP)**

### **Focus on Healthy Aging:**

**Multi-year funding for systems of care that deliver improved health outcomes for older adults**

**Application deadline: August 16, 2024, 5:00 p.m. EDT**

## Introduction

Through this RFP, the CVS Health Foundation (“the Foundation”) is announcing its **Focus on Healthy Aging (FOHA)** initiative, a multi-year philanthropic investment to improve health outcomes for people over age 60. As a growing proportion of the U.S. population makes up this age group, communities face greater demands to meet older adults' health and health-related social needs. The Foundation intends to collaborate with established multi-sector, community-based partnerships working to strengthen systems of care at the local level. We are interested in supporting mature collective impact efforts that are aiming for increased effectiveness.

This new, five-year initiative will launch in October of 2024 in up to five sites nationwide. City- or county-level partnerships will each be awarded \$1,000,000 to implement strategies that improve health outcomes for older adults. FOHA defines its priority population as individuals (60+ years) who are at the most significant risk of experiencing negative brain, heart and/or mental health outcomes. Drivers of risk for this population may include geography (e.g., rurality, vulnerability to natural disasters, poor air quality, and extreme heat), social isolation, race/ethnicity, limited English proficiency and socioeconomic status. The vision of this initiative is that older adults will experience their stage of life with fair and just opportunities to attain their highest level of mental and physical health.

## Our theory of change

The Foundation has identified three long-term outcomes that it believes can be accomplished through collective, sustained action at the local level. All funding recipients will be expected to deliver the following outcome by the conclusion of a five-year grant period:

1. Systems of care that **simplify the delivery of, and navigation to,** health care and social care for older adults with brain, heart and mental health conditions.

In addition, applicants must commit to use project funds to deliver **at least one** of these **additional** long-term outcomes:

2. Increased **early detection, diagnosis and management** of brain, heart and/or mental health conditions in the priority population.
3. Improved mental and physical health of **unpaid caregivers**.

As they work towards these long-term outcomes, applicants must engage in robust, candid and comprehensive evaluation of their efforts. The Foundation will provide technical assistance in developing and ongoing refinement of measurement plans

that include details about key metrics, data sources, and data collection and analysis frequency.

Project plans will reflect each applicant's local context and challenges. Accordingly, short- and medium-term project outcomes, which may include policy-related changes, will vary across the funded sites and reflect state and federal regulatory requirements as applicable. While the Foundation encourages applicants to propose a variety of proven, robust strategies for achieving the required long-term outcomes, it is particularly interested in understanding how the strategies below can be implemented locally:

- A. Mitigate **risks related to extreme heat, pollution and natural disasters** by increasing access to transportation, protective shelter and social support networks.
- B. Utilize **closed-loop referrals** to deliver health care and address the health-related social needs of older adults with brain, heart and mental health conditions.
- C. Use technology and/or in-person programming to **reduce social isolation and support aging in place**.
- D. Provide unpaid caregivers of older adults with educational opportunities, respite care, support groups and/or other resources to **reduce emotional and physical stress**.

Applications that include any of the strategies listed above will be awarded additional points.

Given the complex and unpredictable nature of systems change, applicants will have the flexibility to refine, iterate and adapt their strategies over the five years.

Consistent with its trust-based philanthropy practices, the CVS Health Foundation is committed to serving as an engaged learner and relationship-oriented stakeholder in the change process.

## **Eligible geographies**

Through this initiative, the Foundation intends to fund projects in the following states:

**Arizona, California, Florida, Georgia, Illinois, Kentucky, Michigan, Missouri, New Jersey, New York, North Carolina, Ohio, Pennsylvania and Texas**

Projects and partnerships based in states other than those listed above are not eligible to apply for funding.

## Award structure

Each selected project will receive a \$1,000,000 award. This award will be disbursed in installments of \$200,000 over five years. The Foundation understands that in some cases, the funding required at various points of the project period (e.g., at the launch or the close) may need to be greater or less than \$200,000. We will dialogue with award recipients to determine a disbursement schedule that best supports the scope of work.

After the first installment, future grant disbursements will be contingent on the organizations progressing toward their goals, as evidenced by the completion of grant requirements.

Applicants must designate a partner who will submit the application on behalf of the multi-sector partnership entity, serve as the fiscal agent and receive the funds in the event of an award. This partner must have 501(c)(3) status with the Internal Revenue Service.

## Application process

To be considered for an award, applicants must submit the required information and materials no later than **5:00 pm EDT on Friday, August 16, 2024**. These include:

- Written and video-recorded responses containing detailed information about the partnership history, project plan, experience and capacity to carry out a complex, multi-year project
- A detailed, five-year project budget
- Letters of commitment from all multi-sector partners
- A preliminary five-year project timeline, including key activities and deliverables

Applicants can begin the process by navigating to the landing page of the [CVS Health Foundation's Submittable application portal](#).

## Application content

Applicants will be asked to provide written **and** video-recorded responses to questions in the categories below. We are not interested in highly produced video recordings that were previously developed for marketing or communications purposes, nor are we seeking narrated slide decks. Only recordings showing at least one (but preferably more than one) person answering the questions on this application will be considered.

1. **About us** – Members of the multi-sector partnership will tell how their collaboration began, why it came together and the values guiding its collective work. They will also introduce their community to us, sharing about its strengths, populations served, their unique challenges and why they believe things can improve.
2. **Project plan** – This section will capture information about the strategies and outcomes that comprise this five-year project. Applicants will describe their plan for executing their strategies, how they will measure progress toward the project outcomes and the experiences they bring to bear as they work together on this challenge.
3. **Diversity, equity, and inclusion** – Applicants will describe the extent to which the composition of their multi-sector partnership reflects the diversity of their community. They will help the Foundation understand what equitable health outcomes mean in their unique context. They will also present their plans for shaping their strategies with ongoing input from community members with diverse identities and lived experiences.
4. **Partnership capacity** – Applicants will help the Foundation understand their collective capacity to execute their selected strategies and deliver the required long-term outcomes. They will describe the partner organizations' knowledge, skills, and experience and how these organizations have worked to leverage these strengths. They will also reflect on how the Foundation's multi-year investment can support the growing edges of their collective impact efforts.

## Our focus on learning

The Foundation will make space for our program team and grantees to learn and grow from our collective work under this initiative. The Foundation's learning practices are rooted in our commitment to continually increasing our positive impact on the health of communities.

We are eager to learn from the work of the organizations that will join this initiative. To support this learning, we will schedule semi-annual virtual site visits with project leaders and visit each community in person. We will also convene all awardees in person periodically (dates still to be determined) and support travel-related expenses (i.e., airfare, lodging, ground transportation) for project representatives to attend these events. The Foundation will co-develop agendas for all learning events in partnership with grantees.

The Foundation will engage its internal learning and evaluation manager to help us capture and act on this initiative's critical lessons and insights. Funded projects are also expected to use part of their award to pay for the services of a contracted or in-

house evaluation specialist. During the first three months of the award period, the Foundation will work with each awardee to better understand their plans for measuring the project's progress towards its expected outcomes.

## Timeline

**June 17, 2024 - RFP launches.** Prospective applicants are invited to assess their collective readiness for the FOHA program. This self-assessment is accessible at the start of the application process.

**August 16, 2024 – Application deadline.** Applicants must submit all required application materials before 5:00 PM EDT to be considered for funding.

**September 27, 2024 – Notification of award decisions.** All applicants will receive an email that notifies them of decisions related to their funding applications. Upon being notified, applicants selected to receive funding will begin working with the Foundation's program team to complete grant agreements and other administrative requirements.

**October 14, 2024 – Awarded projects launch.** Contingent on all grant terms and agreements being met, project activities will launch. The Foundation will host a call for awardees to meet and greet one another. We will also schedule 60-minute sessions with each project to help us understand key metrics, data sources and frequency of data collection and analysis.

## Questions

*We have compiled a set of frequently asked questions for prospective applicants' reference. If your question is unanswered below, email us at [CVSHealthFoundation@CVSHealth.com](mailto:CVSHealthFoundation@CVSHealth.com). We will respond within 1-2 business days.*

- 1. Under this RFP, what counts as a “multi-sector, community-based partnership”?**  
We are interested in supporting mature collective impact efforts at the local level and recognize that these efforts are operationalized differently depending on the community context. While being open to different partnership designs, we are specifically looking for partnerships that include the following components:
  - a. An articulated intention to address challenges that span beyond any single organization's mission, constituents and sphere of influence.
  - b. A local backbone agency that coordinates and aligns the work of all partners.
  - c. A regular cadence for bringing together partners to share information, engage in strategic planning and develop solutions.

- d. A diverse representation of sectors serving the priority population. For this RFP, we encourage applications from partnerships that include the health care, labor, legal, transportation, housing, social services and public health sectors.
- e. A history of **working together** to serve older adults for **at least three (3) years**.

We will not consider applications from universities that propose “multi-sector” partnerships consisting of different schools within a single university system. We will also not consider applications in which the backbone agency is a national organization.

We encourage prospective applicants to complete the Applicant Readiness Self-Assessment to determine if this opportunity is right for them.

**2. How many organizations should be part of the multi-sector partnership that the Foundation intends to support?**

We are interested in the quality of partnerships represented in the application, not solely on the quantity. For this reason, we are not prescribing a minimum or maximum number of partners. However, the Foundation expects that projects will onboard new partners over five years to make progress toward the required outcomes. We also expect that at least one partner will directly deliver health care or mental health services to the priority population.

**3. Can an organization be included in two different funding applications?**

Suppose a city or county has multiple multi-sector partnerships dedicated to improving health outcomes for older adults. In that case, it is allowable for an agency or organization to submit a letter of commitment in more than one application. However, we will consider a fiscal agent submitting multiple applications on a case-by-case basis and a favorable decision is not guaranteed. All applicants are responsible for contacting the Foundation to determine their eligibility for this type of exception.

**4. Why will the Foundation award additional points to applications with specific strategies?**

A set of strategic learning questions guides the Foundation’s grantmaking. These questions help us reflect on our practice and refine our programs to be as impactful as possible. We believe the four strategies we highlighted in the RFP are particularly promising approaches to improving the health outcomes of older adults. By

incentivizing applicants to include these strategies in their projects, we hope to have a critical mass of grantees from whom to learn more about the contexts that best support implementation.

**5. What does the Foundation mean when it refers to practicing trust-based philanthropy?**

Our program staff subscribes to the definition of trust-based philanthropy used by the Trust-Based Philanthropy project: “At its core, trust-based philanthropy is about redistributing power—systemically, organizationally and interpersonally—in service of a healthier and more equitable nonprofit sector.” We are committed to refining our practice to embody this definition as fully as possible in our relationships with applicants, grantees and other key stakeholders.

**6. What tools do you provide to help applicants understand how the Foundation will score proposals?**

We provide a detailed scoring rubric on the FOHA program’s landing page on the Submittable website.

**7. Within the eligible states, are there community types you’re interested in or not interested in, such as urban or rural areas?**

We are interested in supporting communities experiencing sustained or increasingly adverse outcomes related to health outcomes for older adults. We will give special consideration to cities or counties that provide data describing disproportionately high prevalence of brain (cognitive and memory capacity), heart and mental health conditions compared to most other parts of their state.

**8. If my organization currently has an active grant from the CVS Health Foundation, can it still apply as a lead agency or a supporting partner?**

Yes, grantees with active CVS Health Foundation or CVS Health grants may be included as a lead or supporting agency in an application for this program.

**9. Can multi-sector partners collaborate to complete the application?**

We expect the application content to be developed collaboratively among all partners. When completing the online application, applicants should select the agency that will serve as the owner of the application process. That owner can invite other partners to collaborate on the responses. Collaborators can work on the application together in real time, but only the owner can submit the final content of the application.



## 10. Why do you ask for video-recorded and written responses?

We prefer not to rely solely on written responses, as this may create an unfair advantage for applicants who can enlist the paid services of a highly skilled grant writer. Furthermore, we believe applicants should have more than one mechanism for representing the strengths of their collective work. Video-recorded responses can be an effective way to convey the vibrancy and trust that exists in a multi-sector partnership.

## 11. Do you have tips for preparing my application's video responses?

In our review of video responses for other programs, applicants scored highly by doing the following:

- Prepared their content ahead of time but didn't read from a script when delivering the response
- Had multiple partners respond to the questions, with each partner introducing themselves by name, title and affiliation at the start of their segment
- Used relatable stories to describe their partnership and the people they served
- Avoided narrated slide decks and highly-produced materials

The online application will indicate the questions that require a video response and include the maximum lengths allowed. Accepted video files include:

- .3GP (3GPP Multimedia File)
- .AVI (Audio Video Interleave File)
- .FLV (Animate Video File)
- .M4V (iTunes Video File)
- .MKV (Matroska Video File)
- .MOV (Apple QuickTime Movie)
- .MP4 (MPEG-4 Video File)
- .MPG (MPEG Video File)
- .WEBM (WebM Video File)
- .WMV (Windows Media Video)

Please note, the max file upload size is **400mb** and the maximum total submission size per application is **800mb**.

We strongly recommend that applicants upload their video responses **prior to August 16**, as increased traffic to the application portal on this day can cause delays in uploads, resulting in participants being at high risk of missing the 5:00 p.m. EDT deadline.

**12. How will funded projects be expected to report on their progress toward achieving their outcomes?**

All applicants are required to select at least two long-term outcomes from the Foundation's theory of change. These outcomes are meant to guide decisions about strategy and partnerships. At the start of the funding period, each project team will meet with the Foundation's program team to identify the metrics that best describe what the project's short-, mid- and long-term success will look like. The Foundation will ask grantees for a measurement plan, including identifying data sources, data collection methods and reporting tools.

Each project will be expected to dedicate some staff time to collecting and reporting data that demonstrates their progress. While we don't prescribe a specific dollar amount, we expect annual project budgets to include funds to pay for the services of a contracted or in-house evaluation specialist. This individual will serve as the point person for the Foundation's learning and evaluation manager when discussing project metrics, KPIs or outcomes.

Projects will provide the Foundation with updates about their progress in written and conversational formats. The Foundation will hold semi-annual conversational site visits with each project team. All projects must submit annual interim progress reports and a final written report at the close of the grant period.

**13. Can you review my application before the deadline to let me know if I am on the right track?**

In fairness to all applicants, our program staff will not review and give feedback on project concepts or applications in progress.

**14. Do you have a cap on indirect costs?**

Up to 15% of the \$1,000,000 budget can support indirect costs, which we define as overhead expenses that relate to the overall operations of your organization or are shared among projects or functions. Indirect costs include but are not limited to accounting, insurance, legal services and utilities.

**15. Do you have any other considerations related to the finances of the lead agency?**

We will prioritize applications in which the lead agency's annual operating budget is at least \$1,000,000, typically indicating a stable base of financial operations in a community-based organization.

**16. Are there restrictions on how much of the budget can go toward salaries?**

We understand the importance of having stable funding for part- or full-time partnership coordinators. While we don't have a cap on dollars allocated toward salaries, we support including direct costs that support programming whenever possible. If the project intends to carry out program activities with other funding, we request a brief description of the sources that will be used to cover the cost of such activities.

**17. Can program costs include home improvements and modifications?**

Helping older adults age in place may require some residence modifications. While these costs are not precluded from being in a budget, we strongly encourage partners to find other funding streams to cover home improvements so that program dollars from this grant can be concentrated on strengthening the system that delivers health and social care to older adults.

**18. Will you provide feedback on a declined application?**

Yes. If you want feedback on a declined application, please email us at [CVSHealthFoundation@CVSHealth.com](mailto:CVSHealthFoundation@CVSHealth.com).