

# Tufts Health Plan Foundation

## The Momentum Fund | Program Guidelines

### Overview

#### Background and Context

There is momentum in Massachusetts, New Hampshire and Rhode Island to create stronger communities for all generations. By fostering new ideas and engaging organizations, businesses and agencies inside and outside the aging sector, Tufts Health Plan Foundation hopes to advance the movement to make our cities and towns livable for all ages.

Communities often find it challenging to secure resources to support early-stage initiatives and innovative efforts. The Foundation created the Momentum Fund to address this gap.

The Momentum Fund offers smaller investments that energize innovation to support communities pursuing and/or advancing age- or dementia-friendly efforts.

#### Goals of the Momentum Fund

- Foster community-led approaches focused on embracing and implementing age-friendly and dementia-friendly efforts.
- Support innovative initiatives addressing the needs of older people who want the opportunity for greater health in their community, especially those focused in underrepresented communities and/or addressing inequities.
- Create opportunities for collaboration among older people, the organizations that serve them and other sectors.
- Ensure older people and those who support them are actively engaged in the solutions identified in these grants.
- Share learning and insights across communities in Massachusetts, New Hampshire and Rhode Island.

### Project Characteristics

*All projects must be community-led and address healthy aging with an emphasis on innovation and collaboration. Proposals should include a clear and feasible plan for the project including key activities, expected outcomes and potential long term impact. Preference will be given to projects exhibiting the characteristics below. Please note this is not an exhaustive list, but serves as guidance to organizations seeking support from the Momentum Fund.*

#### Core characteristics:

- **Age-Friendly/Dementia-Friendly:** Project addresses the needs of an aging population in the community as defined by them. This can include: projects that exist within or alongside an age-friendly/dementia-friendly effort and/or address one or more of the eight domains (See Helpful Resources.) Projects focused on one domain should also demonstrate connections to community needs or goals. Project may also emphasize intergenerational engagement.

- **Community Engagement:** Project demonstrates the participation and input of older people in planning or implementing the work. Project is developing or has established connections among older people and others in the community, including individuals.
- **Innovation:** Project focuses on a new idea or new way of working together in community. The term *innovation* should be defined by your community and may include (but is not limited to):
  - Employing inclusive practices in activities that require authentic community engagement and participation (e.g., conducting a community needs assessment)
  - Testing or adapting a new approach that has been successful in another community context (e.g., adapting a promising or best practice in your local context; advocating for policy change)
  - Taking risks—implementing and/or exploring an idea that promises increased impact (e.g., enhancing delivery of a service, focusing on a vulnerable population)
- **Collaboration:** Project demonstrates organizations working together to achieve a common goal. Partner organizations may have a wide variety of roles and can include those not usually considered part of the aging sector (e.g., businesses, planning agencies).
- **Inequities:** Project focuses on inequities experienced by older people in traditionally underserved populations and/or those who support them. This could include: racial or ethnic groups, women, those with low-income, disabilities, mental health conditions, and/or are immigrants and refugees, have limited English proficiency, identify as LGBTQ or live in rural communities.

#### Important project attributes:

- **Community needs:** Project focuses on needs identified and documented by the community and/or healthy aging data reports and specifically focuses on older people. (See Helpful Resources.)
- **Best/promising practices:** Project applies best/promising practices.

### Eligibility

- **Legal status:** Must be an organization with current 501(c)(3) non-profit status or have a 501(c)(3) partner that can serve as fiscal agent. Municipalities or government agencies are welcome participants/partners/collaborators, however they cannot be funded directly. The Foundation welcomes applications submitted through a fiscal agent.
- **Defined community:** Organization describes the community to be served. Community can be defined geographically—such as a neighborhood, city or region, or using common characteristics, such as faith, ethnic, racial or cultural demographics—and specify challenges to aging.
- **Stage of connections/collaboration:** The Momentum Fund will consider support of early-stage grassroots efforts taking an innovative approach to healthy aging as well as more established community collaborations addressing challenges and/or risk-taking in their work.

- **Current Tufts Health Plan Foundation grant status:** It is our practice to only support one grant at a time to any organization. Current Foundation grantees should consult grant officer.

## Funding Parameters

- **Grant Size:** up to \$10,000 per year.
- **Use of Funds:**
  - Funding must be used for a defined project. It is not intended for general operating and/or long-term sustained funding. Our goal is to catalyze community engagement.
  - Proposals for direct service programs must describe how the effort addresses more than the needs of the individuals being served. Preference will be given to those that have a broader impact including system-level change.
- **Funding duration:**
  - Momentum Fund supports up to 12 months of work
  - Grants will be awarded beginning November 1, 2018 and remain in effect to October 31, 2019 (Projects would be a maximum of 12 months in duration.)
  - Organizations awarded a Momentum Fund grant are eligible to apply for a second year of support only if first year funds are fully expended and reporting requirements are met. If an organization wants additional support beyond year two, requests must go through Tufts Health Plan Foundation's regular grant processes.
- **We will not fund:**
  - Candidates for public office
  - Capital projects and/or durable medical equipment
  - Endowments
  - Fundraising events, capital campaigns or annual fund drives
  - General operating expenses
  - Government agencies (unless they are part of a collaboration led by a community-based organization)
  - Individuals (including scholarships, internships and/or fellowships)
  - Lobbying
  - Organizations that advocate, support or practice discrimination based on race, color, religion, age, national origin, language, gender, gender identity, sexual orientation, disability, veteran status or other characteristic protected by law
  - Private foundations
  - Religious organizations for religious purposes
  - Research for specific diseases or conditions
  - Underwriting of medical expenses

## Key Dates

**June 6 and August 23, 2018:** [Webinar Information Sessions](#)

**September 20, 2018:** Momentum Fund applications due by 4 p.m. Eastern Time

**Week of October 29, 2018:** Notification of awards

**November 1, 2018:** Grant awards begins

## Application Process

- Eligible applicants should submit proposals in our online grants management system, [Cybergrants](#), by the due date.
- Momentum Fund proposals will be reviewed by Foundation staff; proposals meeting program criteria will undergo review by state committees.
- A review committee for each state (Massachusetts, New Hampshire and Rhode Island) will review proposals and makes recommendations to Foundation team. Foundation staff will make final decisions on awards.
- During the process, Foundation staff may reach out with questions or to request clarification on proposal submissions.
- Applicants will be notified via email of award decisions during the week of October 29, 2018.
- Successful proposals will receive funds via electronic funds transfer. The Momentum Fund grant period is November 1, 2018 – October 31, 2019.
  - Reporting Requirements – a six -month interim report and final report are required. These reports should be submitted in Cybergrants. The interim report will be due by May 1, 2019 and the final report by December 4, 2019. Key insights and results reported by grantees will be shared to foster learning among stakeholders.
  - Grantees are encouraged to reach out with any questions, changes or updates on their work.
- If your proposal is not successful in this round, Foundation staff is available to provide feedback.

## Helpful Resources

### AGE-FRIENDLY/ DEMENTIA-FRIENDLY COMMUNITY RESOURCES

[Grantmakers in Aging Age-Friendly Resources](#)

[AARP Livable Communities](#)

[AARP: The Maine Guide](#)

[AARP Livability Index](#)

[Dementia Friendly America](#)

[Dementia Friendly America Sector Guides](#)

[Frameworks Institute: ReFraming Aging](#)

[Mid-America Regional Council: Community AGEnda resources](#)

[WHO: Ageing and Life Course – Age-Friendly Environments](#)

[WHO Checklist of Essential Features of Age-Friendly Cities](#)

**MASSACHUSETTS RESOURCES**

[AARP Massachusetts](#)

[Dementia-Friendly Massachusetts Initiative](#)

[Executive Office of Elder Affairs](#)

[Massachusetts Healthy Aging Collaborative](#)

[Massachusetts Healthy Aging Data Report](#)

**NEW HAMPSHIRE RESOURCES**

[AARP New Hampshire](#)

[Alliance for Healthy Aging](#)

[Tri-State Learning Collaborative Age-Friendly Toolkit](#)

**RHODE ISLAND RESOURCES**

[AARP Rhode Island](#)

[Building Age-Friendly Rhode Island](#)

[Rhode Island Healthy Aging Data Report](#)