# REQUEST FOR LETTERS OF INTENT TO APPLY FOR GRANT FUNDING

# Deadline: Tuesday, April 12, 2022, at 5 p.m.

# Submit LOI materials to The Philanthropic Initiative (TPI) at: <https://forms.gle/vjzih2ZJN7YeBitK9>

# ----------------------------------------------------------------------

Exhale – The Family Caregiver Initiative (Exhale) is funded by the Ralph C. Wilson, Jr. Foundation ([www.rcwjrf.org](http://www.rcwjrf.org)), Health Foundation for Western & Central New York ([www.hfwcny.org](http://www.hfwcny.org)), and Ann Arbor Area Community Foundation ([www.aaacf.org](file:///C:\Users\lisap\Documents\TPI\Respite%20Pilot%20Program\RPP%20EXPANSION\Workshops\www.aaacf.org)).

**Program Overview**

Family caregivers are essential to many older adults living in the community who need extra support and compassion. The Ralph C. Wilson, Jr. Foundation, Health Foundation for Western and Central New York, and Ann Arbor Area Community Foundation are partnering to recognize and learn how to provide this same support and compassion back to family caregivers throughout western New York (WNY) and Washtenaw County, Michigan. Exhale – The Family Caregiver Initiative is managed by The Philanthropic Initiative (TPI) with support from Teresa Lawrence of International Deliverables.

Exhale funds innovative collaborative projects that reimagine and increase respite opportunities for family caregivers of older adults. Respite, a period of rest or relief, can play a key role in reinforcing caregiver well-being and effectiveness, leading to better health, social-emotional outcomes, and lower costs of care for family caregivers and older adults for whom they care. Simply knowing respite services are available can lower caregiver stress by 70%. Caregivers need support to find time to rest, clear their minds, and take a break.

Exhale helps teams of organizations learn and apply creative problem-solving techniques and work together to improve and increase respite opportunities for family caregivers of older adults. The Exhale program has three components:

1. Training and capacity building in creative problem solving and project management
2. Grant funding of pilot projects or other innovative initiatives that support respite for family caregivers
3. Supporting effective implementation, sustainability, and expansion of respite projects and services through a learning community for grantee partners.

During the first three months of Exhale’s 2022 expansion (January through March), organizations interested in supporting family caregivers of older adults are participating in a Creative Problem Solving workshop series. This facilitated training is designed to set the stage for bringing new ideas and solutions for increased and better respite opportunities to fruition.

Exhale grant proposal development activity begins now. Organizations participating in Creative Problem Solving training workshops are encouraged to form partnerships with other organizations and family caregivers, and apply Creative Problem Solving techniques to develop innovative strategies for increasing or improving respite opportunities in their communities. Through a Letter of Intent (LOI) process (described below), lead organizations are invited to submit (on behalf of their project team) respite project plans for grant funding consideration. Eligibility criteria are outlined below.

To be eligible for Exhale grant funding, lead organizations (grant recipients) must:

* Have participated in Exhale Workshops (Creative Problem Solving training).
* Be either a public sector or not-for-profit organization headquartered in and serving the following New York counties: Erie, Niagara, Orleans, Genesee, Wyoming, and Monroe; or in Washtenaw County, Michigan.
* Identify (in their LOI) intention to partner with other organizations to increase, improve or expand respite opportunities for family caregivers of older adults. Partnerships must be two or more organizations working together to implement respite services, refer or recruit caregivers to respite opportunities.
* Engage family caregiver input in project design and articulate a plan for continued caregiver input throughout the project.
* Demonstrate (in the LOI) application of Creative Problem Solving techniques and experience with adapting programs or services based on input received or lessons learned.
* Be able to receive grant funds electronically.

# Request for Letters of Intent to Apply for Exhale Project Funding

Process: Eligible organizations are invited to submit up to three different respite project ideas for funding consideration (this may include up to three LOIs that vary in scope and budgets). Each LOI must include a completed LOI form and a preliminary project budget (both required forms are attached for review). Applicants may use the budget template to describe how your organization proposes to spend Exhale grant funds. The budget template may be modified as needed to summarize project spending plans more accurately.

Completed LOIs and budgets are due by 5pm on Tuesday April 12, 2022 (see link below for online LOI and budget forms). Completed LOIs and budgets will be reviewed by a team of Foundation staff and experts. The review team may request a phone interview to discuss applicants’ project plans, budgets, or goals.

Links to a follow-up Exhale Grant Application online form will be emailed to invited applicant teams by Monday May 16, 2022. Responses to the Exhale Grant Application and final project budgets are due by Friday, June 24, 2022. Technical assistance from TPI and Teresa Lawrence will be available to invited teams during May/June 2022. Applicants will be notified of their selection to receive an Exhale grant by Monday, August 15, 2022.

**Grants:** We anticipate awarding grants to support a range of projects. Projects may be short-term (6-12 months in duration) or longer-term (up to three years). We anticipate project budgets also varying but not exceeding $300,000. We also anticipate funding only a few (3-5) projects at the maximum amount. Project budgets will vary depending on the number of partner organizations, project scope and duration. Ultimately, the number and size of grants awarded will be determined based on the number of LOIs received, the quality and scope of the project plans, geographic and community diversity, and potential for impact.

Exhale grant funding is intended for respite programs and services. LOIs including building capital requests (requests for physical space) will not be considered. If (in the future) a funded Exhale project demonstrates need for additional or renovated physical space, increased or new caregiver participation must be shown for at least one year before funding requests for physical space can be considered. At that time, modest requests for physical space improvement (not exceeding $20,000 or 25% of the initial grant award, whichever is less) may be considered.

Grantee partners will be asked to submit at six-month intervals a written progress summary and financial report on grant expenditures to date. Projects greater than one year in duration will identify and track interim milestones. For shorter-term grants (grants that are shorter than three years duration), additional Exhale funding opportunities may emerge for selected projects based on achievements in Exhale and geography.

**Technical Assistance (TA):** Grantees will have ample access to TA in creative problem solving, proposal development, and marketing and outreach planning to support project design.

* Proposal development TA is available from Lisa Payne Simon at TPI. Contact Lisa at [lsimon@tpi.org](mailto:lsimon@tpi.org) or by phone at 510-453-4633.
* TA in creative problem solving and design process is available from Teresa Lawrence. Contact Teresa at [teresa@internationaldeliverables.com](mailto:teresa@internationaldeliverables.com) or by phone at 716-536-4848.
* Marketing and outreach planning guidance from Crowley Webb will be shared with workshop participants. Individual team TA will also be available at Workshop #5 (the Exhale Project Design Workshop).

**Exhale Learning Community:** For the duration of their funded projects, grantees are asked to participate in a learning community that meets virtually three times per year. In addition to providing peer learning, exchange, and support opportunities for grantees and their respite projects, the learning community provides technical assistance on a range of topics, including communicating with caregivers, marketing, evaluation planning, team process and leadership supports (including FourSight training), and so on. Information about emerging best practice and strategies for sustaining caregiver respite opportunities will also be shared at the learning community. Stipend support will be available for organizations that wish to continue participating in the learning community beyond their grant period.

**Timeline:**

|  |  |
| --- | --- |
| Friday, February 11, 2022 | Request for Letters of Intent to Apply for Grant Funding (including the required LOI form and budget template) will be emailed to all organizations participating in Exhale |
| Tuesday, February 15 | LOI review and a question & answer opportunity will occur at Exhale Workshop #3. |
| Tuesday, March 8 | Caregiver field research and Exhale Ideation Session findings will be shared to help inform family caregiver respite project design and planning. |
| March 28 (Ann Arbor, MI) and March 30 (Buffalo NY) | Workshop #5 will include TA and facilitated team time to support Exhale project planning. All team members should plan to attend this workshop; family caregiver team advisors are also encouraged to attend. |
| Tuesday, April 12 at 5 p.m. | Deadline to submit LOI responses and preliminary project budgets online at: <https://forms.gle/vjzih2ZJN7YeBitK9> |
| April 15 – May 16 | LOI and budget review period. Applicants may receive follow-up questions from TPI during this time. |
| By Monday May 16 | Invited teams will be notified by May 16 of requests for written follow-up or budget information. Invited teams will receive an Exhale Grant Application link via email from TPI. |
| May 16 – June 24 | TA will be available from Teresa Lawrence and Lisa Payne Simon throughout this period. |
| Friday, June 24 at 5 p.m. | Deadline to submit Final Exhale Grant Applications and final project budgets. Link for online submission will be provided. |
| By Monday, August 15 | Final Exhale grantee selections will be made; grant awardees will be notified via email from TPI. |
| August/Sept 2022 - July 2025 | Exhale project implementation phase and Learning Community |

**Evaluation:** Exhale applies a developmental evaluation and Results-Based Accountability framework for exploring respite project development, reach and impact. Results-Based Accountability (RBA) is a disciplined way of thinking and taking action used by organizations to improve the performance of their programs or communities. RBA is also an approach for evaluating program design and impact. In Exhale, evaluators will examine (for the overall program and each individual project) key questions illustrating an RBA framework, such as:

* How much did we do?
* How well did we do it?
* Is anyone better off?

Grantees can expect a hands-on evaluation experience that will provide real-time feedback and support for teams to design their project evaluation plan, measure the impact of their respite service on caregivers, assess the impact of Exhale on their organizations and communities, and make mid-course adaptions as needed. The Exhale evaluation team is led by Linda Weiss, PhD (Senior Director, Center for Evaluation and Applied Research, New York Academy of Medicine).

# Guidelines for Submitting Exhale LOIs

# Eligibility (repeated from above)

To be eligible for Exhale grant funding, lead organizations (grant recipients) must:

* Have participated in Exhale Workshops (Creative Problem Solving training).
* Be either a public sector or not-for-profit organization headquartered in and serving the following New York counties: Erie, Niagara, Orleans, Genesee, Wyoming, and Monroe; or in Washtenaw County, Michigan.
* Identify (in their LOI) intention to partner with other organizations to increase, improve or expand respite opportunities for family caregivers of older adults. Partnerships must be two or more organizations working together to implement respite services, refer or recruit caregivers to respite opportunities.
* Engage family caregiver input in project design and articulate a plan for continued caregiver input throughout the project.
* Demonstrate application of Creative Problem Solving techniques and experience with adapting programs or services based on input received or lessons learned.
* Be able to receive grant funds electronically.

# LOI Components – For each respite project idea that you’d like to put forward for funding consideration, please complete and submit the following components:

* + 1. Exhale Letter of Intent Form (<https://forms.gle/vjzih2ZJN7YeBitK9>)
    2. Preliminary Project Budget (the budget template is attached and accessible through the above link). Using the link above, please upload your completed budget for online submission together with your LOI Form.

# Have questions? Questions may be emailed to Lisa Payne Simon at lsimon@tpi.org. In addition, every Exhale Workshop is a Q&A opportunity (feel free to ask questions there).

**Deadline to apply:** Please submit all Exhale LOI and preliminary budget forms at: <https://forms.gle/vjzih2ZJN7YeBitK9> by 5pm on Tuesday, April 12, 2022.

If you have questions regarding the online LOI submission process, please contact Sharon Rajadurai at [srajadurai@tpi.org](mailto:srajadurai@tpi.org).

THANK YOU!

**Exhale Letter of Intent to Apply for Funding (please complete using the online LOI Form)**

**Cover Sheet**

Lead Organization Name (grant recipient):

Organization Address:

County where organization is based:

Contact person for LOI correspondence (name):

Email:

Telephone:

Contact person signature:

Executive Director (name):

Email:

Telephone:

Executive Director signature:

**Exhale Letter of Intent to Apply for Funding (please complete using the online LOI Form)**

**Questions to Answer**

Answer the questions below for each project that you would like to propose for grant funding consideration. LOIs should generally not exceed 3 pages in length.

*Lead Organization and Project Team*

1. Briefly describe your organization, including the county where it is headquartered, and regions served.
2. Identify other organization(s) that you will partner with on your Exhale project team. Include core team member names, titles, and role(s) each team member will play. Identify strengths or relationships these organization partners bring that will help you design and implement a successful respite project and recruit caregiver participation.

*Respite Project Planning and Description*

1. Describe your team’s respite project idea. *Note: teams may submit up to 3 different project ideas of varying scopes and budgets*
   1. How will your project improve existing respite opportunities and/or increase respite opportunities for family caregivers of older adults in your community?
   2. Describe your caregiver target audience(s):
      1. What specific caregiver groups or types of caregivers will you target? (For example, caregivers of life partners, millennial caregivers of parents or other older adults, sandwich generation caregivers, etc.)
      2. How will you inform family caregivers about this opportunity?
      3. What partnerships have you or will you create to identify, refer, and recruit caregivers to your respite opportunity?
   3. Provide at least 3 examples of family caregiver input that has informed your proposed project design, implementation, or outreach plan.
   4. What geography(s) will your project serve? (Check all counties that apply)

\_\_ Erie

\_\_ Niagara

\_\_ Genesee

\_\_ Orleans

\_\_ Monroe

\_\_ Wyoming

\_\_ Washtenaw

\_\_ Other (please specify)

If your project will serve a particular area or region within a county, please specify:

* 1. What is the requested funding period?

1. How has your team applied Creative Problem Solving in developing your respite project proposal? Describe key insights, tools or takeaways as a result of applying Creative Problem Solving in the development of your plan.
2. What are your project goals?
3. What results or impact would you like to see from your respite project (and for whom)?
4. Is there anything else you’d like to share about your respite idea, project team, target audience, or community?

**END OF LOI FORM**

-----------------------------------------------------------------------------------------------------------------------

**(And, for completion later…) FOLLOW-UP FINAL GRANT APPLICATION**

**Final Grant Application invitations will be sent to invited teams by Monday, May 16. Final Grant Application questions will include:**

1. **Custom questions for each applicant will be included here as a follow-up to each LOI and budget submitted….**
2. **In addition, everyone will be asked to answer these questions:**
3. How has (or will) your team apply project management principles in your respite project?
4. Describe your preliminary marketing and outreach plan for your project.
5. Beyond measuring the reach of your respite project or service, what other ideas do you have for measuring or assessing its impact?
6. How do you envision sustaining your respite project or service beyond the grant period?
   1. What sustainability-promoting partnerships will you seek?
   2. What reimbursement or sustainability policy opportunities might you explore?
7. How might your project be scalable?
8. Is there anything else you’d like to share about your respite idea, project team, target audience, or community?

**Thank you!**