



THE COMMUNITY FOUNDATION

MURIEL H. MARSHALL FUND FOR THE AGING GRANTMAKING GUIDELINES

The Muriel H. Marshall Fund for the Aging was established in 1998 with a \$7.8 million bequest made by Roxanne Marshall. Its purpose is to improve the quality of life of Genesee County's older residents by supporting non-medical services that help them remain engaged, independent, and in their own homes as long as possible.

Role of Planning Team

A Planning Team ensures faithful compliance with Roxanne's wishes by identifying non-medical needs and opportunities for older adults in Genesee County, determining funding priorities and possibilities that are responsive to local needs, shaping grant-making strategies that meet the criteria of the Marshall Fund, providing for appropriate community input and reporting, and ensuring on-going evaluation of programs and outcomes.

The Planning Team serves in an advisory capacity, recommending grants for Rochester Area Community Foundation (RACF) Board approval. Chaired by a Community Foundation volunteer, its membership includes Genesee County residents, the Genesee County Office for the Aging director, other Genesee County stakeholders, and a Community Foundation staff representative. Including the chair and staff representative, the Planning Team has up to 12 members. Efforts are made to have representation from all geographic areas of the county. See "Ask Marshall Planning Team Expectations of Membership" for additional information.

Grantmaking Guidelines

Grants address unmet needs of older adults in Genesee County as they coincide with the guidelines set forth in a memo provided to the Community Foundation by Roxanne Marshall. The current portfolio of grant programs has been strategically developed over time. Since 2020, Marshall-funded programs are branded and referred to as "Ask Marshall."

The Ask Marshall Planning Team invites potential grantees to submit grant requests; it does not employ a competitive request for proposal, or RFP, process.

Ask Marshall programs are typically funded on an ongoing basis, with new grants awarded every year. Funded programs are routinely monitored by the Ask Marshall Planning Team, which may recommend that a program be funded with some modifications, funded with essentially the same format, discontinued if it no longer meets the intended need, or transitioned to another agency based on the judgment of the Planning Team or the Community Foundation.

If dollars available from the Muriel H. Marshall Fund for grantmaking decline in any given year, past practice has been to sustain the highest level of service possible by encouraging the maximum carry-over of funds from the previous year and temporarily reducing service levels, if necessary.

Grantees are expected to work collaboratively with Genesee County Office for the Aging (OFA) and with each other to create a coordinated, seamless system of Ask Marshall-funded services for Genesee County residents. Other expectations include participation in a centralized system of intake and data collection through OFA and coordination of marketing and volunteer training activities with the OFA Ask Marshall Marketing Coordinator.

Grantees are typically allowed to carry over unused funds. Carryover funds are credited towards the program's operational expenses for the subsequent grant period, thereby reducing the amount awarded to continue the program.

Grantees must have locally based services and an office in Genesee County.

Participation in Ask Marshall-funded programs is open to all older adults in Genesee County, without regard to income.

The Ask Marshall Planning Team recommends that no more than 50% of total MHM grant funds in any given year be used to fund transportation-related programs and services. Historically, these programs and services have accounted for approximately 35% of the annual total.

Ask Marshall grants may not be used to displace other public or private funds that are currently providing a service or program in the county.

The Planning Team limits its support of Proration/General Management expenses to 10%.

Matching funds are not required, but where possible, grantees are encouraged to supplement their Marshall funding with in-kind support, program fees, and/or donations.

Ask Marshall grantees are encouraged to provide ongoing training that enhances program performance and develops staff and volunteers' understanding of aging issues. Grantees are also encouraged to coordinate or share general aging service training programs with other Ask Marshall grantees' staff and volunteers.

Evaluation of grantees' work looks at the provision of services, the impact those services have on the quality of life for individuals served, and their alignment with Roxanne Marshall's original intent. Grantees' participation in the centralized data collection process provides the agreed-upon data necessary for effective evaluation.

Grantees must seek to serve individuals in all geographic areas of Genesee County, with a special focus on underserved areas. The Ask Marshall Planning Team may invite pilot projects that serve a limited geographic area, but only if they have the potential to serve the entire county, if successful.

County-wide promotion of all Ask Marshall programs is coordinated by the Marshall-funded marketing coordinator. Grantees are expected to coordinate marketing efforts with the marketing coordinator to avoid duplication of efforts. Grantees are expected to use the Ask Marshall brand and logo on Marshall program materials and to attribute the source of funding as "An Ask Marshall program supported by the Muriel H. Marshall Fund for the Aging of Rochester Area Community Foundation."