Request for Proposals

Supporting Physicians Transitioning to Late Career Status and Retirement

1. Program Overview / Background

As the physician workforce ages, a growing number of physicians face complex physical, mental health, professional identity, workplace, and career transition that are often overlooked. While extensive research and support programs have focused on early- and mid-career physicians, the transition to late-career and retirement presents unique stressors. These include age-related health issues, adapting to evolving technology, financial concerns, changing expectations in the workplace, and emotional or social challenges such as loss of identity and isolation.

For many, these challenges can contribute to depersonalization, diminished satisfaction, premature retirement, and post-retirement wellbeing struggles. Conversely, there are untapped opportunities to support experienced physicians by extending their engagement through flexible practice models, meaningful alternative roles, and structured retirement transitions. Doing so will not only benefit physicians but also strengthen the sustainability and resilience of the overall healthcare system.

This is the second release of this RFP. The inaugural 2026 RFP generated a robust and highly competitive response, reflecting broad interest in better understanding and supporting physicians as they navigate this important stage of their professional and personal lives. Building on that momentum, the Physicians Foundation seeks to further evolve this area of interest by supporting well-developed, collaborative proposals that promote successful, replicable, and sustainable approaches to late-career engagement, retirement planning, and post-retirement well-being. We encourage innovative models that help physicians maintain purpose, connection, and meaningful contribution while supporting workforce continuity and the transfer of experience to future generations.

The goal of this RFP is to to identify, develop, implement, and evaluate practical and replicable approaches to that address the transition to late-career status and retirement. By identifying drivers of wellbeing and effective support mechanisms, this initiative will build strategies to sustain engagement, promote mental health, and help physicians maintain a sense of professional identity, purpose, and contribution throughout their career trajectories and beyond.

Objectives

- Identify key drivers of burnout, diminished wellbeing, and premature retirement among late-career physicians.
- Identify differences that may reflect practice specialty, work setting, gender, racial, ethnic, and other variables in the physician workforce.
- Explore flexible, sustainable professional models such as telemedicine, hybrid clinical roles, teaching, consulting, research, leadership, mentoring, patient advocacy, or volunteering.
- Support late-career physicians' mental health and transitions by developing peer engagement, retirement planning, and identity-preservation strategies.

- Develop scalable, evidence-based interventions that enhance physician wellbeing into and through late-career stages.
- Propose methods to evaluate outcomes and impacts over time, including physician satisfaction, retention, patient care continuity, and organizational benefits.
- Evaluate the business and workforce case for successful interventions, including implementation cost, administrative requirements, and continuing operations.

Expected Deliverables

- Comprehensive research on the unique challenges and opportunities for late-career and retired physicians.
- Proposed frameworks or models for engaging physicians through their late-career stages, providing access to strategies and support for their professional and personal transitions.
- Pilot programs or demonstration projects in health systems or medical organizations.
- Assessment tools for tracking physician wellbeing, workforce retention, and retirement transitions.
- Make scalable recommendations for national dissemination.

2. Eligibility Criteria

Applicant organizations must be:

a. Defined by the IRS as a 501(c)(3) public charity (NOT a private foundation). This public charity status must be maintained throughout the life of the grant and applicant organization must be in the United States, OR
b. A Section 115 educational institution in the United States.

Note: The Foundation cannot award grants to organizations that do not fit these eligibility criteria. Ineligible applications will not be reviewed.

3. Selection Criteria

Selection will be based on the following:

a. Alignment with priorities presented in this RFP
b. Alignment with PF goals to promote physician wellbeing and workforce sustainability
c. Demonstrated knowledge and expertise on physician wellbeing
d. Demonstrated knowledge and experience working directly with physicians
e. Demonstrated knowledge and experience conducting research in a variety of settings
f. An approach that is inclusive of diverse populations of physicians, specialties, and workplace settings
g. Presentation of a detailed plan and timeline for accomplishing the project objectives, with realistic expectations, clearly defined goals, outcomes, and assigned resources
h. Presentation of a plan for evaluation that defines desired short- and long-term outcomes and steps to collect data for measurement of progress towards those outcomes
i. A well-justified budget derived from a clear and compelling understanding of resources needed to carry out the project successfully. The project budget must include a narrative describing each line item, including new salaried positions. If existing salaried positions are included in the budget, an explanation should be provided indicating why funding from the Foundation is needed to support

those positions. Demonstration of replicability at a reasonable cost in terms of dollars and efficient use of human resources should be considered and explained.

4. Grant Size

Grants are available for projects up to two years in length. The Physicians Foundation anticipates funding in the amount of up to $100,000 per grant, but ultimately proposals will be evaluated based on their merits, alignment with stated goals, and the potential impact of the proposed projects. We seek innovative and cost-effective solutions that demonstrate a clear understanding of the project's objectives and deliverables. No more than 15% of grant funds may be allocated to general administrative purposes or indirect project expenses. A limited number of grants will be made.

5. Evaluation & Monitoring

Projects should have a plan for evaluation that defines desired short- and long-term outcomes and steps to collect data for measurement of progress towards those outcomes. Evaluation plans should provide tools to assess the success of interventions and include both short and long-term evaluation parameters. Executing on evaluation plans during the project period is the sole responsibility of grantees. Grantees are expected to meet requirements for the submission of narrative and financial reports, as well as periodic information needed for overall project performance monitoring and management. They will be expected to produce scholarly products, to be presented at conferences or published in peer-reviewed literature, based on their work. Project directors may be asked to participate in telephone or in-person meetings and give progress reports on their work. In addition to the main evaluation, grantees will be asked to contribute data to a central repository of data regarding wellbeing interventions to be managed and analyzed in aggregate by the Physicians Foundation Center for Physician Experience, which is focused on approaches that enhance physician wellbeing and quality of care. It is expected that grantees would work collaboratively with this Center on any aggregate analyses arising from use of this data repository.

6. Use of Grant Funds

Grant funds may be used for the following expenses: project staff salaries and benefits, consultant fees, data collection and analysis, meetings, supplies, project-related travel and other direct project expenses. According to the Foundation's policy, grant funds may <u>not</u> be used for any of the following:

- Unrestricted general operating expenses
- Ongoing programs, or existing staff, unless their time is being redirected to a new project
- Payment for services of a fiscal agent
- Endowment funds
- Religious purposes
- Fundraising activities or events (e.g. annual fund drives, phone solicitations, benefit tickets)
- Capital expenditures by the grantee (e.g. repairs, equipment, etc.)
- Lobbying or political activities
- Activities related to litigation, arbitration or other dispute resolution
- Medical education at the undergraduate or residency training levels
- Research that is not practice-based
- Clinical research or animal research
- Research and/or development of drugs or medical devices
- Any activity inconsistent with the Foundation's status as a 501(c)(3) charitable organization

7. Payment and Reporting Schedule

Awarded grants will be provided with a clear reporting and payment schedule, which will be as follows:

Timeframe	Event
Execution of grant agreement	40% of grant agreement disbursed
Halfway through grant	First interim report due. The second payment of 40% will be disbursed upon submitting a satisfactory interim narrative and financial report, and if the financial report shows that at least 75% of the initial funding has been spent.
End of grant	Final report due. The final 20% of funds will be disbursed upon submitting a satisfactory final narrative and financial report. The financial report must indicate that all funds were spent on grant-approved activities. Any funds not spent according to the approved budget will not be disbursed and will need to be returned if spent from the first 80% of payments disbursed.

8. How to Apply

To apply for a grant, complete the online application form and follow the proposal instructions. Proposals must be complete and submitted with all required attachments in order to be considered for funding in this grant cycle. Please follow the proposal instructions closely and contact the Foundation's office if you have questions.

Please see below for instructions on accessing the application in the online system:

1. If you're new to the system, please reach out to Anna (apatching@gmafoundations.com) to be set up with a username/password that will connect to your organization's existing account. If you're a returning user, please use your previously set up login information.
    a. If you can't remember your password, please click the "Forgot your password?" link below the username/password entries to reset it.
2. Once you've logged in, please click the "Apply" link at the top left of the window and enter access code "**wellbeing2**".
3. A link will appear below when you enter the access code. Please click the Apply button next to that text to begin the application.

If you applied to this RFP last year and would like to edit your previous application as opposed to starting fresh, please email Anna Patching (apatching@gmafoundations.com) and she can make your previous application available to you for editing. Please note that you will need to upload updated financial documents.

8. Program Contacts

Questions about this RFP or the Foundation in general should be addressed to Rachel Rifkin (rrifkin@gmafoundations.com). Please note that Rachel is happy to provide comprehensive support and feedback to any requests that come in prior to January 31,2027. Technical questions about the online application should be directed to Anna Patching (apatching@gmafoundations.com).

9. Timetable

RFP Release Date:	October 30, 2026
Proposals Due:	February 11, 2027 (5pm EST)
Funding Decisions:	End of April, 2027
Project Start Date:	June 1, 2027

10. About The Physicians Foundation

The Physicians Foundation is a public charity seeking to advance the work of practicing physicians and improve patient access to high-quality, cost-efficient care. As the U.S. health care system continues to evolve, The Physicians Foundation is steadfast in strengthening the physician-patient relationship, supporting medical practices' sustainability and helping physicians navigate the changing health care system. The Physicians Foundation pursues its mission through research, education and innovative grant making that improves physician wellbeing, strengthens physician leadership, addresses drivers of health and lifts physician perspectives.