



INNOVATIVE
STABLE HOUSING
— INITIATIVE —

Upstream Funding Opportunity

Information Session 2: Online Portal and Budget Form

January 16, 2020

Project Team



Nineequa Blanding
Vice President, Grantmaking



Jamiah Tappin
Manager, Community Engagement



Emily Breen
Grants and Program Coordinator



Information Session Objectives

The goal of this session is to share more detail on:

- The **Innovative Stable Housing Initiative (ISHI)** vision, goals and values
- The purpose of **Upstream Fund** and the current funding opportunity
- Technical assistance related to proposal submission including:
 - › Navigating the online portal for proposal submission
 - › Completing the budget form



Housekeeping

- For those on the webinar:
 - › Please rename yourself with your name and organization - e.g. Jamiah Tappin (HRiA)
 - › If you have any **questions** related to this webinar, please type them into the chat box.
 - › When responding to questions, please select “to everyone”
- The webinar recording and slides will be available.



Agenda

Topic	Length
Welcome and Introductions	5 minutes
Background Information	10 minutes
Question and Answers	5 minutes
Review of Budget Form and Application Portal	20 minutes
Questions and Answers	15 minutes
Next Steps	5 minutes



Background Information



What is ISHI?

- The **Innovative Stable Housing Initiative** (ISHI) is a participatory grantmaking process investing \$3M
- ISHI is funded by Boston Medical Center, Boston Children's Hospital, and Brigham and Women's Hospital.
- The **Upstream Fund** aims to amplify collective action and reducing barriers to accessing safe, healthy and stable housing through policy, systems and environmental change.
- The Upstream Fund is one of three funding opportunities



ISHI's Goals

1. Identify policy, systems, population, and place-based approaches that address displacement and increase housing stability.
2. Fund these approaches through an inclusive, participatory grantmaking process where community voice and power are centered.



INNOVATIVE
STABLE HOUSING
— INITIATIVE —



ISHI's Vision

A Greater Boston where **long-term, affordable, quality housing is a human right, universally available, and accessible to all**, and where **those** who have been most impacted by **inequitable and oppressive systems are liberated** and reaching higher levels of economic sufficiency and autonomy.

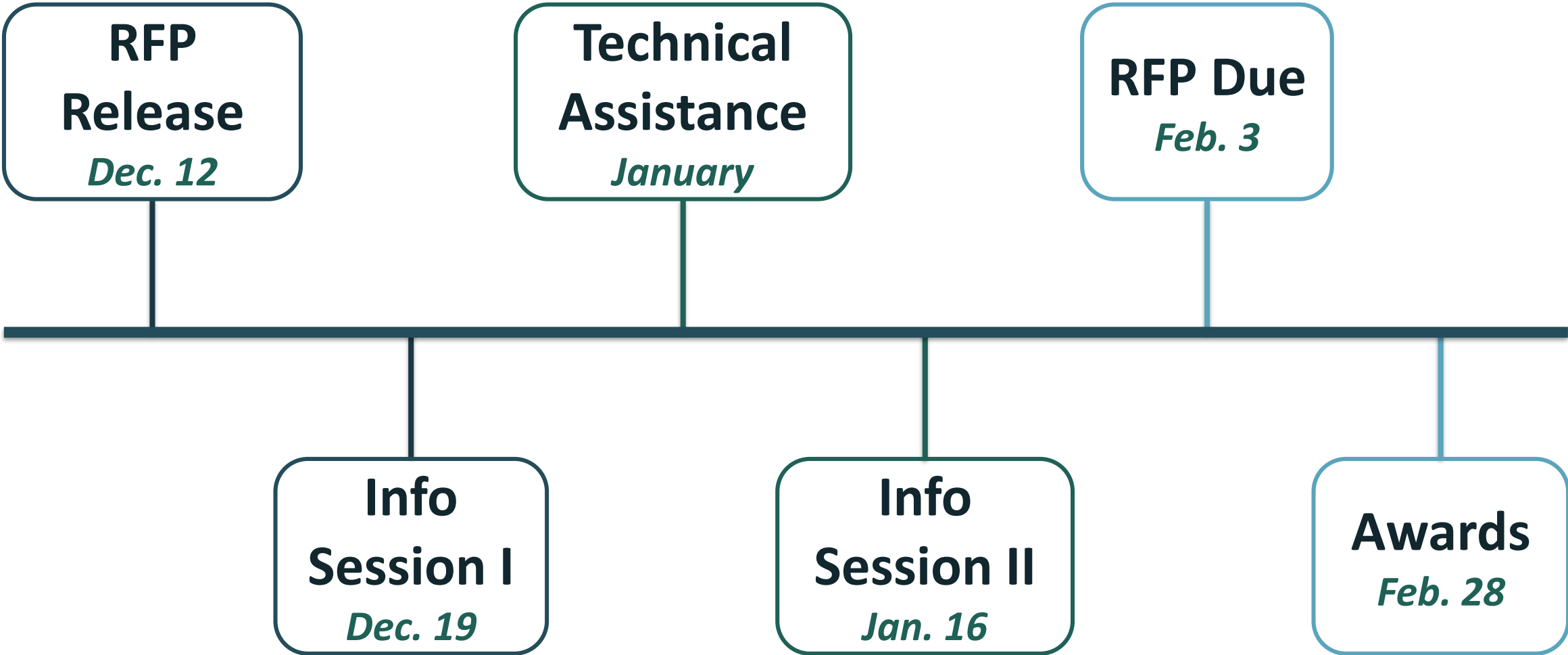


About the Upstream Fund

- **Purpose:** To advance policy and systems change efforts that support and promote stable housing
- **Eligibility:** Boston-based resident groups, grassroots organizations, or community-based organizations with 501(c)3 tax-exempt status or fiscal sponsorship
- **Grant Awards:** A total of \$600,000 for up to 4 awards. Up to \$150K for a one-year grant period
- **Timeframe:** One year, with option to renew every year for up to 2 years
- **Due Date:** Monday, February 3, 2020 at 11:59 PM



Timeline



Questions?



What questions do you have for us?



Review of Budget Form



3. Phase of Your Effort

Planning Funding for Emerging Efforts

- Up to **\$75,000**
- Initial **coalition building** or **planning processes**
- Newly formed partnerships or new policy or systems change effort

Implementation Funding for Advanced Efforts

- Up to **\$150,000**
- A **feasible path for policy change**
- Strong potential to enact a housing-related policy or systems change within two years.



7. Budget

- Include all employee and non-employee compensation and subcontracts. Also provide brief explanation for each line item.

Requirements/Specifications

- One year grant period
- Indirect or fiscal sponsorship costs should not exceed 10%
- Direct services, capital campaigns or endowment drives are not allowable expenses.



Budget Slides



INNOVATIVE STABLE HOUSING — INITIATIVE —

Budget Form Instructions

Completing the Budget Form

This document has four tabs: 1) General Instructions, 2) Budget Summary, 3) Budget Form and 4) Detailed Instructions. Specific instructions are embedded within each tab.

Due to the variety of applicants and proposals, we recognize that the budget template may not cover all circumstances. Should you have any specific questions, please contact Jamiah Tappin at jtappin@hria.org as early as possible prior to the deadline so that we may best assist you.

Components of the Budget Form

Summary - The budget summary will be auto-populated as you complete the Budget page. While you do not need to fill anything in, please check for any errors before submitting. An outlying number on this page may indicate a typo on another page.

Budget - On this sheet, you should list budget line items for the organization leading the project. This includes Employee Compensation, Non-Employee Compensation, Operating Expenses, and any subcontract amounts. In addition, we ask that you provide a brief explanation for each line item.



Budget Form – Color Key

TAB Color Key

Yellow Tabs are informational.

Green Tabs will auto-populate as you complete your form. Please double-check for errors.

Blue Tabs should be completed by the applicant

CELL Color Key

Pink cells are fields where values should be inserted by the applicant.

White cells are fields that will auto-calculate based on values in the yellow cells.

Italic text are examples. **Remember to change/remove before completing your form.**



Budget Summary

Budget Summary

Total amounts requested from the Innovative Stable Housing Initiative (ISHI). **You do not need to complete this tab.** It will auto-populate as you complete the budget form. However, please do check for errors before submitting. An outlying number on this page may indicate an error or typo somewhere else.

Total Employee Compensation (salaries and benefits)	\$ 35,000.00
Total Non-Employee Compensation	\$ 500.00
Total for All Operating Expenses	\$ -
Total for All Subcontracts	\$ -

Totals

Direct Expenses	\$ 35,500.00
Indirect Expenses	\$ 5,325.00
Totals	\$ 40,825.00



Employee Compensation

Form A: Total Project Costs from All Sources

1. Lead Organization Employee Compensation

Position Title	Annual Salary / Hourly Wage	FTE / Hours to be worked on project	Amount Requested	Explanation
<i>Example - Salary</i>	\$ 60,000.00	0.50	\$ 30,000.00	
<i>Example - Hourly</i>	\$ 25.00	200.00	\$ 5,000.00	
			\$ -	
			\$ -	
			\$ -	
Subtotals			\$ 35,000.00	

Payroll Taxes and Fringe Benefits 26.00%

Total Employee Compensation (salaries + benefits)



Non-Employee Compensation

2. Lead Organization Non-Employee Compensation

Type of Compensation	Amount Requested	Explanation
<i>Ex. Stipends for focus group members</i>	\$ 500.00	
	\$ -	
	\$ -	
	\$ -	
Total Non-Employee Compensation	\$ 500.00	



Operating Expenses

3. Lead Organization Operating Expenses

Item	Amount Requested	Explanation
Office Supplies	\$ -	
Equipment	\$ -	
Copying and Printing	\$ -	
Telephone and Fax	\$ -	
Postage and Delivery	\$ -	
Meeting Space/Rental	\$ -	
Program Advertising	\$ -	
Staff Travel	\$ -	
Training and Educational Supplies	\$ -	
Staff Training	\$ -	
Evaluation	\$ -	
Other Expenses (list and explain in form B)	\$ -	
Total Operating Expenses:	\$ -	

Subcontracts

4. Subcontracts		
	Amount Requested	Explanation
Fiscal Sponsor Name: _____	\$ -	
Subcontractor 1 Name: _____	\$ -	
Subcontractor 2 Name: _____	\$ -	
Subcontractor 3 Name: _____	\$ -	
Subcontractor 4 Name: _____	\$ -	
Total Costs for All Subcontracts	\$ -	



Totals

		Totals	
		Total Amount Requested	
Total Direct Expenses (Total Employee Compensation + Total Non-Employee Compensation + Total Operating Expenses)		\$	35,500.00
Total Indirect Expense (may not exceed 10% of Direct Expenses). Insert indirect rate here:	10%	\$	3,550.00
GRAND TOTAL		\$	39,050.00



Detailed Instructions

Detailed Instructions

Lead Organization Employee Compensation

In Part 1, please list each employee within the lead organization who will be working on the project.

Annual Salary / FTE - Enter the position's salary in Column D and their FTE in Column E. FTE (Full-Time Equivalent) should be the ratio of time spent on the project relative to a full-time work schedule (Ex. if someone works half of their time on this project and half on another, their FTE in Column E would be 0.5) *OR*

Hourly Wage / Hours - For hourly employees, indicate their hourly wage in Column D and the number of hours worked annually on this project in Column E.

Amount Requested - total project costs are calculated based on Column D multiplied by E.

Payroll Taxes and Fringe Benefits - please list payroll taxes and fringe benefit percentages, if they are available to you. The benefits will then be calculated based on those percentages.

Lead Organization Non-Employee Compensation

Non-Employee compensation can include stipends for committee members, volunteers, community members and ambassadors, focus group members, individual consultants (e.g., translation), and other partners engaged in the project.

Types of compensation can include stipends/reimbursements for child care, transportation/travel, meals, etc. Should you have any specific situations you are unsure about, please feel free to reach out.

Lead Organization Operating Expenses

List the total project cost for each line item, if applicable. Then list any other funding sources that cover all or part of the costs of each item. The remaining amount that you are requesting from the MA Community Health Fund will be calculated for you.



Review of Online Portal



The Application Portal – Basic Steps

1. Follow the link on the ISHI website
2. Create an account
3. Login
4. Complete application questions
5. Add attachments
6. Save or submit



The Application Portal – How to get there

1. Visit <https://www.ishiboston.org>
2. On right-hand menu under Grantmaking click Upstream Fund
3. Click “Learn more” under description
4. On the next page, scroll down until you see application materials

Upstream Fund

GRANT OPPORTUNITY

Background

ISHI Upstream Fund is an opportunity to amplify collective action and reduce barriers to accessing safe, healthy and stable housing through policy, systems and environmental change. This fund aims to invest in organizing and coalition building efforts that are geared towards advancing policy and systems change, within and across four areas of focus: anti-displacement; tenant protections; community control of land; and asset building.

Total Grant Funds: \$927,800 over three years

Award Amount: A total of \$600,000 for up to 4 awards. Up to \$150K for a one-year grant period

Application Deadline: Monday, February 3, 2020, at 11:59 PM

Questions? Please contact Jamiah Tappin, Health Resources in Action, jtappin@hria.org

LEARN MORE

Application Materials:

ONLINE APPLICATION

NARRATIVE TEMPLATE

BUDGET TEMPLATE

Accessing the Portal

1. Follow the link provided. This is the page you will see the first time



Health Resources in Action

Advancing Public Health and Medical Research

[Contact Us](#) | [Logout](#)

Please Sign In

Welcome to Health Resources in Action's online portal for application and report submission.

NEW Users: Click the "Create an Account" link below to get started.
We recommend creating your account with a general email inbox.

RETURNING Users: If you have an account, enter your email address and password to login.
If needed, click the "Forgot Password" link below to reset your password.

E-mail

[Create an Account](#)

Password

[Forgot Password?](#)

Login

2. Create an Account

New Applicant?

An account allows you to access your saved and submitted applications at any time. It also allows us to send you a submission confirmation e-mail and notify you if additional information is necessary to process your application.

E-mail

Confirm E-mail

Password (must contain at least 5 characters, with both letters and numbers)

Confirm Password

Continue

[Return to login](#)

The Application – Eligibility Reminders and Instructions



INNOVATIVE STABLE HOUSING — INITIATIVE —

[Contact Us](#) | [Application Materials](#) | [Logo](#)

Please read before beginning the application.

Eligibility

The Upstream Fund investments will span two types of efforts: Planning Funding for Emerging Efforts OR Implementation Funding for Policy Change. See the full RFP for descriptions of each stage of development.

Massachusetts based non-profit 501(c)3 organizations are eligible to submit proposals. A lead agency without non-profit status must include a 501(c)3 fiscal sponsor. Partnerships must include at least one community group or organizing effort within neighborhoods that have been identified as priority areas as part of ISHI's planning process – East Boston, Mattapan, North Dorchester and Roxbury. Lead applicants should have a history of leading organizing efforts, especially those focused on policy and systems changes.

Instructions

The full Request for Proposals (RFP) for the Innovative Stable Housing Initiative (ISHI) Upstream Fund can be found by clicking the Application Materials link in the top right corner.



The Application



[Contact Us](#) | [Application Materials](#) | [Logout](#)

[Info and Instructions](#) | [Applicant Information](#) | [Contact Information](#) | [Proposal Information](#) | [Attachments](#) | [Review My Application](#)

Info and Instructions

[Printer Friendly Version](#)

* Required before final submission

About the ISHI Upstream Funding Opportunity

What is the purpose? To advance policy and systems change efforts that support and promote stable housing.

Who should apply? Boston-based resident groups, grassroots organizations, or community-based organizations with 501(c)3 tax-exempt status or fiscal sponsorship.

How much funding is available? A total of \$600,000 for up to 4 awards. Up to \$150K for a one-year grant period

How long is the funding for? One year, with option to renew every year for up to 2 years.

Application Deadline: Monday, February 3, 2020 at 11:59 pm

The Application

Info and Instructions

Applicant Information

Contact Information

Proposal Information

Attachments

Review My Application

Applicant Information

Printer Friendly Version

- * Required before final submission

Applicant Information

- * **Lead Organization Name**

If a partnership is being proposed, the Lead Organization is the organization that is leading the day-to-day work of the project.

- * **Fiscal Sponsor Organization**

The fiscal sponsor is the organization that is fiscally responsible, facilitates reporting, and manages quality and completion of the work plan and all other grant requirements. If the Lead Organization is fiscally responsible for the project, please list again here.

- * **Partner Organizations**

Please list any additional partners directly involved with the project.

Save & Finish Later

Save & Continue



The Application

Info and Instructions

Applicant Information

Contact Information

Proposal Information

Attachments

Review My Application

Contact Information

Printer Friendly Version

* Required before final submission

Organization's Highest Ranking Official Contact Information

Please list the contact information for the highest ranking official for your organization. If you are applying with a **fiscal sponsor**, enter the contact information for the highest ranking official (CEO, President, Executive Director, Municipal Manager, etc.) for the fiscal sponsor organization.

Prefix

Pronouns

First Name

Last Name

Title

Office Address

Office City

Office State

Office Postal Code

Office Phone

E-mail



The Application

Info and Instructions

Applicant Information

Contact Information

Proposal Information

Attachments

Review My Application

Proposal Information

Printer Friendly Version

* Required before final submission

Proposal Details

At what stage of development is your collaboration? (see descriptions of each stage below)

Planning ▼

Stages of Development

Planning Funding for Emerging Efforts: Up to \$75,000 will be available for partnerships to support activities such as initial coalition building or planning processes that contribute to housing-related policy or system changes or outcomes. Emerging efforts can include newly formed partnerships or those that have worked together previously but are beginning a new policy or systems change effort across at least one focus area of the fund (see pg. 2). Proposals should reflect collaborative partnerships involving a minimum of three community partners. Efforts involving 6 or more partners are eligible to request the maximum amount allowed in this category.

Implementation Funding for Policy Change: Up to \$150,000 to support activities that demonstrate a feasible path for policy change relative to the specific focus areas of the fund (see pg. 2). Proposals submitted should include activities that support implementation of an existing plan that has strong potential to enact a housing-related policy or systems change within two years. Proposals should reflect collaborative partnerships involving a minimum of three community partners. Efforts involving 6 or more partners are eligible to request the maximum amount allowed in this category.

What ISHI focus area(s) are you requesting funding for?

Select all that apply.

- Anti-displacement
- Tenant Protections
- Community control of land
- Asset building

The Application

Info and Instructions

Applicant Information

Contact Information

Proposal Information

Attachments

Review My Application

Attachments

Printer Friendly Version

Required Submissions

- 1.Narrative (not to exceed 5 pages)
- 2.Budget Form (template provided)
- 3.A list of current Board members
- 4.Proof of Tax-exempt status

5.**Operating Budget for Lead Agency and Fiscal Sponsor:** Upload a PDF of your organization's current fiscal year operating budget. Specify the fiscal year start and end dates at the top of the operating budget. The current fiscal year operating budget should include only two columns: (1) line items for projected sources of revenue and expenses in the left column and (2) projected total amounts for each line item in the right column. In-kind revenue and expenses (if applicable) must balance.

6.**Financial Statement for Lead Agency or Fiscal Sponsor:** Upload your most recent audited financial statement. If you do not have an audited financial statement, please upload your most recent I-90 return.

7.**One** letter of agreement among the organizations/entities in your collaboration that delineates roles and is signed by an official signatory of each entity.

INSTRUCTIONS FOR UPLOADING:

To attach the file:

- a. Ignore the "Title" dropdown box
 - b. Click the "Choose File" or "Browse" button
 - c. Browse to the location of the document you are uploading and select the document
 - d. The path to the document file will appear next to "File Name" below
 - e. Click "Upload"
- After you "Browse" and "Upload" your files:
 - a. The "Attachments" page will refresh and display the name of the files that were uploaded.
 - b. Click on "Review and Submit" at the bottom of that page which will bring you to the "Review My Application" page.
 - c. If you corrected errors noted by the system, click "Update" and then "Submit."
 - d. For all other changes, simply click "Submit" to complete the process. The online submission is complete when a confirmation statement appears on the screen.

Upload

The maximum size for all attachments combined is 25 MB. Please note that files with certain extensions (such as ".exe", ".com", ".vbs", or ".bat") cannot be uploaded.

Title:

File Name: No file chosen

Tips and Tricks

Review application tab will show you questions you missed

Info and Instructions

Applicant Information

Contact Information

Proposal Information

Attachments

Review My Application



Please correct the problems indicated below.

- **Fiscal Sponsor Organization** is a required field.
- **Partner Organizations** is a required field.
- The application cannot be submitted without the following required attachments. Please click [here](#) to return to the Attachments page.
 - Application Budget Form
 - List of Current Board Members
 - Proof of Tax-exempt status
 - Operating Budget
 - Financial Statement

You can save and finish later and then return to your application by going to your “Account page” and logging in

Save & Finish Later

Save & Continue

Account page: <https://www.grantrequest.com/AccountManager.aspx?sid=2364>



Reminders

- Log into the online portal before the deadline to create an account and familiarize yourself with its format
 - Contact Emily at ebreen@hria.org with any technical challenges as soon as possible.
- Consider submitting before deadlines!



Questions?



What questions do you have for us?



Next Steps



Technical Assistance

- E-mail questions to jtappin@hria.org
- Sign-up for a 15-minute phone session with a technical assistance provider to discuss additional questions:
<https://calendly.com/ishiupstream>



We Want to Hear From You!

Complete emailed applicant survey

Complete poll to provide feedback on today's webinar



Contact Information

Nineequa Blanding, MPH
Vice President, Grantmaking
Health Resources in Action
nblanding@hria.org

Jamiah Tappin
Manager, Community
Engagement
jtappin@hria.org

Emily Breen
Grants and Program Coordinator
Health Resources in Action
ebreen@hria.org

