Massachusetts Community Health and Healthy Aging Funds
Capacity Building Webinar 2
September 12, 2019

Introduction

Hello. Good morning everyone and welcome to our webinar entitled *Massachusetts Community Health and Healthy Aging Funds Capacity Building Session 2*. This is the second part of a 2-part series, and we are thrilled to be here with you this morning. My name is Nineequa Blanding and I have the pleasure of introducing myself to all of you this morning as Vice President of Grantmaking at Health Resources in Action. And, I have the pleasure of also being the Director of the Community Health and Healthy Aging Funds which is made possible through a partnership with the Department of Public Health here in Massachusetts. In this role I have the pleasure of working with my colleagues - Kevin Myers who is the Program Officer for the Community Health Fund, Jennifer Lee - Managing Director of Grantmaking and Program Officer of the Healthy Aging Funds, as well as Emily Breen who is our Grants and Program Coordinator. Together we will lead today's session and we will cover the following objectives.

Objectives

We hope that all participants of this webinar will discuss and understand how to engage other partners in our approaches for advancing health and equity in Massachusetts. We will also cover how to communicate your idea, we will go through the different sections of the Inquiry of Ideas (IOI) and the Request for Proposals (RFP) and share some guidance on forming your idea for submission. We will end with reviewing the logistical process for submitting your idea to these funding opportunities.

Agenda

The overall agenda is as follows. I will start by providing a brief history and background on the Funds. My colleague Kevin Myers will then take us through a brief recap of our first webinar which covered all of the different phases from idea formation to evaluation. We will also discuss engaging partners and, as I mentioned earlier, communicating and submitting your idea. We will end with us some additional resources that might be helpful to you as you prepare for your submission.

Housekeeping

We want to hear from you throughout the session. There is so much learning that we can gain from you today as well. So, if you have any questions or feedback related to this webinar please do remember to type them into the chat box. All answers to questions that are raised, will be available online on our website, which will fall under the Frequently Asked Questions webpage. When responding to questions please select to everyone so that everyone can see the questions that you are raising. We want this to be a dynamic learning process for all parties involved in the session today including ourselves. Please know that the webinar recording, and slides and transcripts will also be available shortly after today's session. To make this webinar accessible we will do our due diligence to communicate all details on all of the slides as well.

Section 1: Background

So, we will begin with just a brief background. As you may recall there are two funds and three funding opportunities. These are listed in blue and green displayed on the slide that we are looking at right now. The two funds are the Community Health Fund and be Healthy Aging Fund. In 2019 we were fortunate to have two advisory committees that were established through a competitive process to guide the vision for both funds. It's important to note that the advisory committee members represented a number of different disciplines across Massachusetts and it was important to bring together diverse perspectives of thought to inform and help shape the vision for these funds which are in alignment with the Commissioner Monica Bharel and the overall mission of the Department of Public Health which is: *to ensure that all Massachusetts residents have an equitable opportunity to achieve the highest possible quality of life.* The three funding opportunities that have come out of these funds are the Policy, Systems, and Environmental (PSE) Change Approaches and Community Health Improvement Planning (CHIP) Processes. These are two funding opportunities through the Community Health Fund. The third fund is the Healthy Aging Fund.

Funds' Visions

Just as a reminder and to help ground us all, the visions for these two funds are as follows.

The Community Health Fund vision is: *to ensure that Massachusetts communities are transformed so that all residents have an equitable opportunity to have the highest quality of life possible*.

The vision for the Healthy Aging Fund is: *to ensure that resources will contribute to equitable systems across sectors affecting community level physical environment and social and economic conditions, ultimately leading to a better quality of life and health outcomes for older adults as they age in Massachusetts.*

Upcoming Deadlines

We recognize that this work cannot be done alone, and the success of this work is really built upon the partnerships that are established. So we invite you all to submit your ideas to us. We have three different due dates that are listed here on the screen for each of the three funding opportunities. As a reminder for Healthy Aging - that is our first submission - that will be due September 18th of this year which is just next Wednesday. All submissions are due at **2 p.m.** that day. We will then have an upcoming due date for the Policy, Systems, Environmental (PSE) Change Approach. We are having a call for all of your ideas to be submitted to us by October 2nd, 2019 at 2 p.m. And the last submission opportunity will be for our Community Health Improvement Planning (CHIP) Process funding opportunity. The due date for that is listed here as November 20th, 2019. Across all of these please note that the submission date is Wednesday at 2 p.m.

Health Equity Tree

As a reminder, the goals of these funds are to work collectively towards health equity which will ultimately lead to improved health outcomes for residents of Massachusetts. Here is a visual that depicts an overall illustration of what we are trying to achieve collectively. Here's a visual of a tree. Imagine the leaves representing the various health outcomes that we see in the community. These range from obesity, heart disease, depression, asthma, stroke, cancer, hypertension, and diabetes. All of these health outcomes are influenced by a number of different factors and the tree represents the various levels of influence that modifies one's risk for developing these conditions. The first level in this context are the branches. These are individual behaviors that influence one's risk for these health outcomes. We have factors such as lack of exercise, substance use, social connections. All of those factors play a role. The trunk and roots acknowledge that there are other factors outside of individual behaviors that influence one's risk of developing certain health conditions. These factors include the built environment, which is represented by the trunk, as well as things happening in the social environment. So, a few examples are the rates of violence and trauma in communities, access to high-quality education, employment, and safe and affordable housing. All of these factors play a role and beneath all of this is what we term as the roots - factors that are highly influential but not as always seen at the surface. These are structural and institutional barriers, if you will, that play a role in modifying one's risk for developing these conditions. These include factors such as poverty, racism, classism, that are perpetuated in policies that influence the prevalence of these conditions in communities

Defining Health Equity

And we are all striving to work towards advancing health equity. What does this mean? This is a definition that has been developed by the Human Impact Partners and adopted by the advisory committee members. We see equity as: everyone has a fair and just opportunity to be as healthy as possible. To achieve this, we must remove obstacles that are in the way of health such as poverty, discrimination, and deep power and balances, and their consequences including lack of access to jobs with fair pay, quality education, housing, safe environments, and healthcare. All of these play a role in one's ability to live high quality of life and attain their best health. And this is what we're striving towards.

Funding Announcement Webinar Materials

As a reminder there are all of the webinars that we have posted as part of this fund are on our website. Please feel free to access our previous recordings on our website at www.mahealthfunds.org and you can also access the frequently asked questions page that I referenced at the beginning of the session. We recognize that this is a learning journey and we cannot do this work alone, so we look forward to working with you all as you prepare for your submissions. I'm now going to hand it over to my colleague Kevin Myers who will provide a brief recap of the first capacity building webinar for us, and also take us through the sections of the session that I reviewed. Thank you.

Section 2: From Idea Formation to Evaluation

Thanks, and good morning everybody. Thank you again for taking the time to be with us here this morning to share with you some additional information that might be helpful for you as you prepare to submit your ideas.

From Idea Formation to Evaluation

We wanted to revisit this model that we proposed last week. From idea formation to evaluation. We wanted to convey the path that an idea would take from idea formation, to communicating your idea, to implementing your idea, and evaluating your idea. Keeping in mind that these four steps don't always happen independently of one another as you'll be consistently communicating your idea to new partners. We also encourage you to start thinking about the evaluation of your idea as you're starting to form your idea, so they're not totally independent of each other. We also want you to know that at the center of this model is health and racial equity and our hope is that applicants and awardees will approach each of these four steps with equity guiding your thinking, your decisions, as well as your actions, as this is a core value of both the Community Health Fund and the Healthy Aging Fund.

Your Feedback – Defining Community

So, if you were able to join us last week, we covered topics including: engaging your community, identifying need and data, and what's your big idea. Throughout last week's webinar we asked several questions of you and would like to report back the main themes of what we heard.

Our first question was: How do you define community? We heard a lot of great responses and we created this word cloud from those responses. So, for those that are unfamiliar with the word cloud, the more common a word is used the larger it would appear in this cloud. You can see here that words like *people*, *group*, *living*, and *relationships*, as well as *geography* were the most commonly used words by you all in your definitions of community. You can also see some words that are a little bit large as well. Those would be *identity*, *background*, *shared*, and *characteristic*. We agree with all the definitions that were provided and we would encourage you to revisit these words as you define and engage your community.

Your Feedback – Strategies to Engage Community

We also asked: *What strategies are effective in engaging your community?* Some of the themes that we heard were: meeting community where they are - this is both physically and figuratively. Then taking time and building relationships. So, this really does take a lot of time to forge those genuine and personal relationships with members of your community. The third theme was providing resources for community to participate. Several of you mentioned providing food, making sure that there's access to child care, that transportation is considered as well. So really ensuring that there are no barriers for commuting to participate in different events and meetings. And the fourth is allowing for shared input and learning. There was an acknowledgement among you all that we all have different lived experiences that are valuable and can inform every step of initiatives. We have a lot to learn from each other and community members are really the experts with what is happening in their own communities. We hope that you consider these strategies recommended by your peers as you prepare and formulate your ideas.

Your Feedback – Additional Data Sources

In addition to the plethora of resources that our colleague Abby Atkins reviewed and shared with you on last week's webinar, we asked you to reflect on other data sources that might be useful for your peers. Here's a list of other resources that they suggested. There are a few state resources, so the MassGIS data layers, as well as the DESE or Department of Elementary and Secondary Education - their school and district profiles. Then there's the 500 Cities Project which is an initiative of CDC or the Centers for Disease Control and Prevention. So, there's some information there about the largest cities within Massachusetts and then also there's some local data sources. We heard from the Essex County Community Foundation about a resource called Impact Essex County, as well as Pioneer Valley's data portal and two other resources that were mentioned were the Continuum of Care Homeless Data as well as Community Action Agency community needs assessments. We recommend considering accessing these data sources now to start familiarizing yourself with them if you haven't looked at them before.

Your Feedback – Moving Upstream

And then our final question that we posed during last week's webinar was about moving upstream. So, we've presented a model that looked at both upstream and downstream approaches and we posed this question: *What would it look like for your organization to move your work upstream?* Here are some of the things that we heard. We heard it would require operating support, political advocacy and education of legislators, alignment between partners - some of which we'll talk about later today, more advocacy with bigger systems, engage different and diverse decision-makers - it would take political will and leveraging connections with community to create space for underserved populations, and leadership. We appreciate that overlap of ideas that you shared with us and we look forward to working with you as we continue to shift the work that we do more upstream and closer to the roots of the health tree. So, thank you for sharing all the feedback during last week's webinar and we hope that you will engage with us today.

Today we will continue through this model and discuss engaging other partners as you formulate your idea. Then we'll dive deeper into this second circle of communicating your idea. Just as a reminder - when we consider a particular idea to address inequity, we continuously ask these four questions especially considering people experiencing those inequities. And those four questions are listed here on these boxes: Who benefits? Who is harmed? Who influences? Who decides? And my colleague Jen Lee will discuss these a bit more as she discusses communicating your idea.

Section 3: Engaging Partners

This section is all about engaging partners and as we think about targeting this work towards the roots of the health tree through upstream approaches, we know that organizations and individuals cannot do this alone. This work requires the collective action of different people, organizations, and sectors. If you haven't yet viewed the Racial Equity Institute's Groundwater Approach, we strongly encourage you to examine this resource which is listed on our website. Through the use of a metaphor and extremely compelling data, the Groundwater Approach makes the case for why this work cannot happen in silos. Because of this we wanted to provide some tools, some tips, and some other resources to help identify, recruit, engage, and sustain partnerships. This is also an area that we heard from you all last month where there was some additional support requested.

Poll Question
Alright so we wanted to start this section with a question and as you start to think about upstream approaches: *Who are those partners you can engage or would like to engage?* Here you can feel free to list specific organizations or types of organizations or different sectors or people. As you're thinking about your response please click the *respond to everyone* and not just the panelist so we can all see your thoughts and ideas.

All right we have one up here about *correctional facilities, community health centers, housing authorities, internal departments, city departments, housing, parks, new development, transportation authorities, housing authorities, public-private partnership opportunities, Councils on Aging, villages, existing coalitions.* A lot of really fantastic it looks like multi-sector partners that you're already engaging or would like to engage. So, thanks for trying to think about that list with us.

The Value of Multi-Sector Partnerships
The title of this slide is "The Value of Multi-sector Partnerships. And why do we engage different sectors and partnerships? As you've seen in the trunk of the health tree that Nineequa presented, there are many different sectors representing those different social determinants of health such as housing, education, employment, and they really play a significant role in health outcomes or the leaves of the trees. So here are four of those values. The first is that multi-sector partnerships allow you to address new and broader issues, develop widespread support for those issues, and encourage collaborative problem-solving. So obviously different sectors have different ways of approaching and solving problems and bring diverse perspectives to the table and really allow for that collaborative problem-solving. Multi-sector partnerships will also allow you to create culturally-relevant solutions. Operating in a silo or within one sector might miss some of the solutions that are relevant to different cultures. Four other values are listed here: it allows you to maximize coordinated approaches to minimize the duplication of efforts, increase communication among partners, and this allows for the ability to leverage additional resources.

Sectors to Engage in Partnership
We want to present you with a wheel of different sectors. We think this is really helpful to have a starting place as you're thinking about engaging different sectors. We suggest using a blank wheel image and completing it with different sectors when you're thinking about which sectors you want to engage. One recommendation is to start with a blank wheel and thinking about which sectors you already engage - feel free to write in the sectors or even the organizations or individuals. Then also think about what other sectors you might want to engage. Where are there sectors where you probably don't have partners? So, this is a wheel here that has examples starting at the bottom we have: transportation, immigrants, refugees, healthcare, government or elected officials, elders or seniors, faith communities, schools, businesses, racial or cultural, economic development, agricultural/food systems, planning, public safety, lawmakers, youth, students, and parks and recreation. We encourage you to consider who and why you want to target or engage, you can also identify specific organizations and people within those sectors.

Poll Question

We wanted to ask another question of you all and that is: *As you think about these funding opportunities, what other sectors might you consider engaging?* You can go ahead and then type in a response into the chat box. We have some here. *Colleges, particularly college student groups to align with others, seniors, housing, education, the faith community, people with lived experience.* Those are all great examples. Thank you.

The Collaboration Spectrum

As we think about different partnerships, we wanted to present this model of a collaboration spectrum and it's seven different categories of collaboration ranging from *compete* on the left-hand side of the screen to *integrate* on the right-hand side of the screen. As you move from the left-hand side to the right-hand side, you'll see three things that happen. The first is that relationships become tighter, trust increases, and turf, or competition for resources, decreases. Note that time is a factor in these categories. Building a relationship or partnership on the right-hand side of the screen, with *collaborate* or *integrate*, does not happen overnight and it does require a lot of time to build that trust and relationship. Naturally you'll find that your partnerships fall into different categories and that's okay. Perhaps it's beneficial for a relationship to fall within the *communicate* category and that's interagency information-sharing. But we hope as you apply for these funding opportunities, that you do come to the table with partners that are identified in the *coordinate* category which is: organizations systematically adjust and align work with each other for greater outcomes. Within the *collaborate* category, which is longer term interactions based on shared mission, goals, shared decision-makers, and resources. Then *integrate*, which is fully integrated programs, planning, and funding. We don't have the expectation that all of your partnerships will be on the right-hand side of the screen, but we do hope that some of your relationships fall within those categories.

Types of Collaboration Models

We also wanted to share different types of collaboration models. This is a slide really for those visual learners, where you can see different types of models. We'll go through those now, the first being a hub-and-spoke model. One example is a traditional funder-grantee model. You'll see at the center there is kind of the lead organization that's the blue dot. And there's different red dots that lead out from that. You'll notice that those red dots are not connected in any way, shape, or form and that's the traditional funder-grantee model. Then you have the affiliate network model where there's a center organization. An example of this is a nonprofit network where each dot that goes from the center has its own set of dots as well. Then there’s the coalition model. Examples here are alliances and learning communities. You’ll notice that this is a little bit different from the other two models that there is no center. Here it's organizations that collaborate together but really there's no center or backbone organization. Then you have bilateral partnerships. One example is a public-private partnership and so there’s two dots that are connected with each other and they each have their own dots, but those dots are not connected with each other. Then we have in the middle this multi-sector initiative. Another example of this would be the Collective Impact Model. Here you'll see that the center is connected to many different dots and each of those dots has their own dots and so you can think of each of those dots that are coming from the blue as different sectors. We hope that you might encourage a multi-sector approach that encompasses some elements by engaging different sectors within your approach.

Circles of Involvement

Here you'll see levels of engagement. This is a tool or visual that can be helpful as you identify partners. Sometimes we might feel that everyone that we partner with needs to be in our core circle, but this is not always true. There are different levels of engagement for different types of partners. And each of these levels is really important. So, within the *core circle*, this is people or partners who do the daily work by planning and facilitating the authentic participation of people in all the circles. The next circle is the *circle of engagement* and those are people that are committed to the plan who can be called on to help with specific tasks at any particular time. People might move from this circle to the core circle as they become increasingly engaged in your approach. The third circle is the *circle of champions* and those are people who are in a formal or informal position of leadership in our organizations and these are advocates who can clear roadblocks or barriers, open doors, and make strategic connections. So, very important circle. The fourth is the *circle of information and awareness*. Those are people who aren't very close to the plan or its implementation, but they do need to be kept in the loop. That leads to the fifth and final circle which is the *circle of possibility*. These are people that you might not think of immediately as being related to the idea or approach but who you might find areas of commonality. They might be interested in partnering, providing helpful resources, or boosting the plan or initiative. We encourage you to think through each of these levels, take stock of who your current partners are and where they might fall and where you can add partners to the list to make your idea or your approach as successful as can be.

Barriers to Partnership

We want to just talk about some common barriers to partnership after you identify those partners. Think about these barriers that might arise as you engage and sustain partnerships. The first barrier is unclear, unrealistic, or vague goals. You really have to be clear and realistic about the goals of your organization, as well as your ideas or initiative, and don't assume that other sectors might speak the same language that you do. Cost to members exceed benefits. You really want to consider what your members and your partners will get out of partnership with you. It's also important to have a great balance of responsibility with authority. Not everyone in your partnership will have the authority or decision-making authority, but it's important that they have an appropriate level of responsibility within your partnership, so they truly feel valued. Another barrier is top-down, external mandates. Sometimes you do have those external mandates. Maybe it's from your grant funder, but that could be a barrier to participation that we would like you to anticipate. Another is unrealistic time frames for success. Frequently we might have those time frames that are unrealistic to produce results, so we do encourage you and your partners to think through what those small steps are to achieve your success that you can lift up and raise. Then a lack of trust and time. This is a really huge one and trust can be really hard especially when it comes to money and potentially competing for other resources.

Poll Question

We wanted to hear from you and think about *What are some of the challenges you've had in identifying and recruiting partners?*

We'll give you a few minutes to think about that and respond. Great, we have: *determining how to split up limited resources/money equitably. So far none.* Wow, that's fantastic. *One challenge I've had in trying to be a partner is getting buy-in from superiors.* Okay great. So actually, engaging successfully in those partners. Okay. *Having enough funding to support those partnerships, long-range time commitment,* someone mentioned *being new so that might pose a barrier, difficulty seeing common goals, being in a small rural community with few options, difference in values.* Yes, a lot of great challenges identified here.

Drivers for Successful Partnerships

Thank you. On the flipside we wanted to present some drivers for successful partnerships, and we'd like to also just digest what you presented to us and potentially come up with some other solutions as well. So, thank you for sharing those. The first is: mutual understanding and clarity of goals. Each sector, if you think about housing or transportation, education sector, has their own language, their own indicators, and their own acronyms. Sometimes it can feel a little bit like alphabet soup. So, it's important to be able to communicate with each other and understand the goals of each new potential partners and what are those core values that guide those goals. Ensuring productivity and mutual benefit of partnerships. Of course, nobody wants to be in a partnership that is not beneficial and is unproductive. It's really finding ways to lift up those benefits and ensure that people's time is spent wisely. Finding champions is also an important driver. Think back to those circles of involvement. Who within partnerships can help you clear roadblocks and open doors? Securing trust is an extremely important driver especially as it comes to money and no partnership can be successful without trust. This also does not happen overnight and requires partners be able to be vulnerable with each other. Sharing data is also very important.

Nineequa shared the visual of those two funds and that each fund is guided by an advisory committee which sets the vision and mission of the fund. We wanted to share just a little bit about the Community Health Fund advisory committee and how they went through a process utilizing some of these drivers for successful partnerships. Over the course of many meetings the committee came to a collective agreement and clarity of the goals of the fund, and to really center the fund on equity. Champions within and external to the committee were found to elevate the importance of racial and health equity. Over time, trust was built between members of the advisory committee and data was also shared to help guide decisions. So that's just one example of how a group of diverse individuals came together in partnership to really exemplify some of those drivers for the successful partnership.

Tips for Identifying and Recruiting Partners

Alright next we wanted to just share some very concrete tips on identifying and recruiting partners. As you're thinking about that sector wheel, and potentially filling it out and taking stock in what partners you might have, we encourage you to think about your own personal contacts and doing some networking - using your contacts as well as your friends, asking others to help make connections for you, and maybe just sitting down with a colleague or a friend and helping you identify who you should be connecting with. Attending events is another tip here. Obviously, we're all very busy these days. You could even take time once a month to attend an event with the intent of networking to be able to connect with somebody. Also, keeping in the back of your mind these two ideas of persistence and patience. So, forging that partnership even if it doesn't pan out immediately as having benefits. Keeping that patience in mind, as well as persistence. In this process, for example, we'll be looking to share your ideas with others to foster collaboration.

Poll Question
We wanted to hear from you again and think about: *What are some strategies you use to identify multi-sector partners?* Some responses coming in. Thank you for sharing.

Find out who is already doing the work and/or wants to do the work collaboratively, personal context, events and networking, identify the goals of the collaboration, and then target partners. That's important. *Attend meetings and gatherings even if the collections are not obvious consider other organizations whose goals are in alignment, direct phone calls, potential partners' events, reaching out to partners with common goals.* Thank you for sharing those.

Then we did hear one of the challenges was identified as sustaining those partnerships, so we wanted to ask you all: *What are some methods that you use to help sustain your partnerships? What's beneficial for you?*

Host networking events measure the non-cash benefits at the end of their events. That's important. *Regular meetings, constant communication, being invested in helping partners meet their goals, identifying quick wins, and making sure that credit is shared.* That's super important. Yes. *Listening, set meetings, action items, check in with them regularly to see what they need, e-mail to partners to update them on progress*. Great, so a lot of communication here and celebrating those quick wins. I think that's really important. So, thank you all for sharing with each other. Now I'd like to turn things over to my colleague Jennifer Lee who will be discussing communicating your idea.

Section 4: Communicating Your Idea

Thank you, Kevin, and hi, good morning everyone. It's a pleasure to join you all. We're thrilled to have you as part of the second in this two-part series of capacity-building webinars. This next section is going to take you through a framework and provide some helpful tips and guidance around communicating your idea.

Idea Formation Guiding Questions
To those of you who attended our webinar last week, you might recognize this next slide, and for those of you hadn't, no worries. We'll walk you through in detail at what this particular slide covers. What this is, is essentially a framework with a set of key guiding questions that we think are helpful in formulating your idea. It's broken up into three components to help you think

about who you will serve, what you will do, and how you will do it. We encourage you, as you're thinking about and developing your idea, as you're pulling together members from your organization and partners from other organizations, to think about what can be done and what you will do, to really sift through and use these questions to help shape, and model, and mold what your specific approach will be. And to think about what your organization told you to address a particular issue.

So, under the section of: *Who you will serve?* We listed a few key guiding questions here. The first is to consider what is: the population who experiences the greatest disparities when it comes to this address and where do those disparities come from? What are their origins and then really defining that for yourself and for your team? The second question really hones in on: What is the need? Really defining and naming the health and racial inequities that exist among the population that you're looking to serve. and defining and articulating what the need is among the population. Then finally, a third question within the section to help you think about who you will serve is: What is the data or information that you have to support the fact that the need exists among the population? What information can you draw from existing sources? From your own organization's experiences? In our webinar last week, Abby Atkins, Managing Director of Community Health Assessment at HRiA, walked through a plethora of different resources and sources of data and information that might be helpful to you in that regard.

The second section of idea formation is thinking about the what. So, what will you do and what will you do specifically to address the need? We framed this in our last webinar and for the purposes of this webinar as *The Big Idea*. As you compare yourself to other organizations in the field, a second consideration under the section is: What makes you the best organization to lead this particular effort that you're proposing? Thirdly: How does your plan really align with the goals of the funds? If you recall the vision statement and goals that Nineequa covered in the earlier slides of his webinar. So how is what you're looking to do really tied to and aligned with the overall goals of the funds?

Then in the final section as you're thinking about idea formation is: How will you do what you're planning to do? Here we're really looking at who else do you need to do this work effectively? Really thinking about your partners and that would really help to supplement or augment your existing skills, knowledge, and expertise. Another consideration is: as you think about the members of the community affected by these issues that you're looking to address, How will you engage them? How might you involve them in the process of shaping your approach and ensuring that, as you think about who is being impacted, they're really a part of the process. So these again just to recap were shared in the last capacity-building webinar last week that we held and help you provide a framework and guiding questions for how you formulate the idea that you have. Once you formulate that big idea the next consideration that we want to provide you with some additional thinking How do you communicate that idea effectively. We want to provide an added layer of considerations as you think about communicating the idea but very specifically, as we know, is top of mind for all of you at this webinar is how you put that into your submission as you apply for these funding opportunities. As you know we have two Inquiry of Ideas out there and one Request for Proposals. Likely, you all are thinking about what will be included in that submission and how to think about it.

The Three Sections of an IOI or RFP

Next, we're going to take a closer look at the three main sections of an Inquiry of Ideas (IOI) or Request for Proposals (RFP). We want to take you in turn through each of the sections, not to re-read or review the questions that we've specifically asked of all of you, but actually to help you unpack some of these questions and to provide you with an added sense of what to think about as you're putting together. And these next few considerations, we have sort of designed or established at the highest level possible and kind of cross-cutting all three funding opportunities that we have, so the Healthy Aging, the Policy, Systems, and Environmental Change Approaches and the CHIP processes. So, these are not particular to any one funding opportunity but rather apply to all three.

Background

The first section that you would be requested to develop in your proposal is the background section. Here we have a few considerations for you to have in mind as you convey your particular approach or big idea, and as you answer the specific question. So, first is this section really gets at: How is your organization prepared to do the work that you are proposing? We encourage you to draw upon your history as an organization, the overall work that you've done before, then very specifically any prior experience that you had in doing work that is either the same as or very similar to what you're proposing to do. This is really talking about how prepared you are and in being able to implement what your strategy is. A second consideration is: Who will benefit from your work? Meaning, who are the individuals and people who will be impacted by the approach that you are proposing? Describing them as much as you can and providing any supporting information about who they are demographically and in the broadest sense possible any descriptive information. Then finally: What information or backup data that demonstrates the inequities that are experienced by this population do you have? Really consider sharing that within the narrative and how your approach would specifically address those inequities among the population that you're looking to serve. So, this slide really encapsulates some high-level consideration that we'd encourage you to have once putting together the background section of your submission.

I'm going to bring up again a slide that Kevin has previously covered which is an important set of four questions that are guiding questions for any approach that addresses inequities. We encourage you to apply this line of questioning with your team members and thinking about that and the approach that you will take. So: *Who benefits? Who is harmed? Who influences? Who decides?* These really supplement and help you unpack again how any approach to addressing inequities should be thought of in terms of who is affected and who is impacted.

Approach

The second major section of any idea or proposal that is submitted for any of these funding opportunities is the Approach section. We're going to similarly walk you through some key considerations when you're putting together this section. As a recap, you've likely described who you are, who your organization is, and what you do, who will be impacted by the work that you're planning through this approach, and why the approach is important overall. Now we want a really hone in on the what, so what will your organization do. We really foresee this section, the approach, as being the real meat of any idea or a proposal submission to highlight. Here you really want to think through how you will implement your approach. What are the key approaches, strategies, activities? How will you identify when you accomplish certain key milestones within your overall approach? So, the big idea really encapsulates all of these components. Secondly and relatedly: How do you plan to engage those who are affected by this particular issue? Considering all the stages in which they can be brought into the fold. And between this webinar, and certainly in that last one that we had last week, we really provided some additional frameworks of thinking about various ways in which community members can be engaged. So, we encourage you to draw upon that as well as other frameworks that you know of or are really applying in your everyday work. Then finally: Do you have the right partners at the table? If so, who are they and what organizations do they represent? What do they bring in terms of knowledge, skills, and relationships that really supplement your organization's ability to do this work? And, if you don't have the right partner at the table at the point when you're submitting either an idea or proposal, what plans do you have for possibly engaging them over the course of time? What strategies and approaches do you have? So, all told these are again some added layers of consideration that we encourage you to think about as you're developing the approach section of an idea or proposal that you're planning to submit.

Resources

The final section of any idea or proposal is the Resources section. Here what we're really looking to highlight or elicit from all applicants are: What are the monetary or non-monetary resources that you need in order to carry out this work successfully? The first way in which we would ask you to help fulfill this section is sharing with us a high-level sense of the budget that you are requesting. We ask you within a particular idea or proposal submission to actually name the funding amount that you are requesting and to help us flesh out how that would help enable you to have either the people, supplies, or the support, the operations that you need to carry out to do this work. Secondly, but also equally important beyond the actual money that these funds could provide, is what are the added knowledge or skills that you feel help you best do this work that you're planning to do? And, what sort of knowledge or skills do you feel like you might not already possess among the individuals of your organization and staff and that you feel that our program could really help you gain? So, we are really interested in what sorts of ways in which we can support you as well in ongoing training and support.

Tips for Submitting a Presentation

So, these next two slides we acknowledge that in any of the funding opportunities: Healthy Aging, Policy, Systems, and Environmental (PSE) Change Approaches or CHIP Processes we've articulated that we welcome creative approaches to making submissions. There are three avenues in which you can make a submission. One is a traditional narrative that's likely written inside of a Word document format and is in written form that addresses all of the questions that are included in either the Inquiry of Ideas (IOI) or the Request for Proposals (RFP). But, we also welcome either PowerPoint/Presentation approaches or video formats as well. To highlight, you'd have to select one of the three. We're not intending to have you submit all three approaches. Just pick either a written format, a PowerPoint/Presentation format, or video format.

If you're exploring the PowerPoint, we wanted to give you some helpful tips that might be useful, whether this is the first time you're considering submitting a PowerPoint for a purpose of a funding opportunity solicitation or not. Just want helpful tips to support you in your work. So, first is to consider using a font that can be read easily among the audience members that you're looking to engage, and the folks who will be reading and understanding your proposal. The second is consider developing bullet points or short sentences. PowerPoint is not as accessible when it's filled with longer sentences and longer stretches of information, but really keeping your bullet points concise and straightforward. Art is a very helpful tool and approach and that supplements how you're conveying your message so where you like to include art, we certainly welcome that in conjunction with other information that you're looking to convey through the PowerPoint slides. You may decide that you want to include charts and graphs as part of your PowerPoint submission. We encourage you, if doing so, to really create clear and understandable labels for what those charts and graphs represent and the data that's captured in there. Then, as you think about the backgrounds for slides, we know that there are many options that are provided through PowerPoint. We do encourage you to keep them subtle and consistent so that they don't retract the messages in the content that you really want to convey in each of the slides, and specifically to consider using a high contrast between the background colors that you could use along with a text or font color. You definitely want to make sure that there is a distinguishment between those types of colors. Just to highlight again, we have set maximums if you do decide to go to PowerPoint route, how many would be considered at a maximum. If you're applying to the Healthy Aging and PSE or Policy, Systems, and Environmental Change funding opportunities, you have a maximum of twenty slides and that is because the first rounds are for Inquiry of Ideas and a subset of those organizations would be invited to submit a full proposal. So, there are essentially a possible two rounds for these two funding opportunities. If you're applying for the CHIP processes funding opportunity, you have a maximum of 40 slides and that is because there's only one round for CHIP application.

Tips for Creating a Video

Sort of on a parallel track if you are considering a video as your option here are some other tips as well to consider. So first, we encourage you to draft or develop a script or outline prior to the actual filming of the video. It will help you pull together the key points that you want to convey and also think about the time that you have available so what you want to get across in a limited time frame. It's likely you may be filming with colleagues and partners but if you are filming yourself alone please consider using a camera with a tripod to keep things steady. Lighting is also a really important aspect, especially if you're recording in an area that may have shadows or darkness. Consider using lighting to highlight the folks who will be captured in the video. Speak clearly into a microphone so that the audio can really transfer and be audible for the person who is listening and watching the video. Maintain backgrounds that are clear and clean so that they don't detract from the information that you are providing through the video and consider multiple takes so that you can choose from different shots. Here again we listed the maximum in these are based on time. So, for the Healthy Aging and Policy, Systems, and Environmental (PSE) Change Approaches, you have a maximum of 15 minutes. Then you have 30 minutes as the maximum for CHIP.

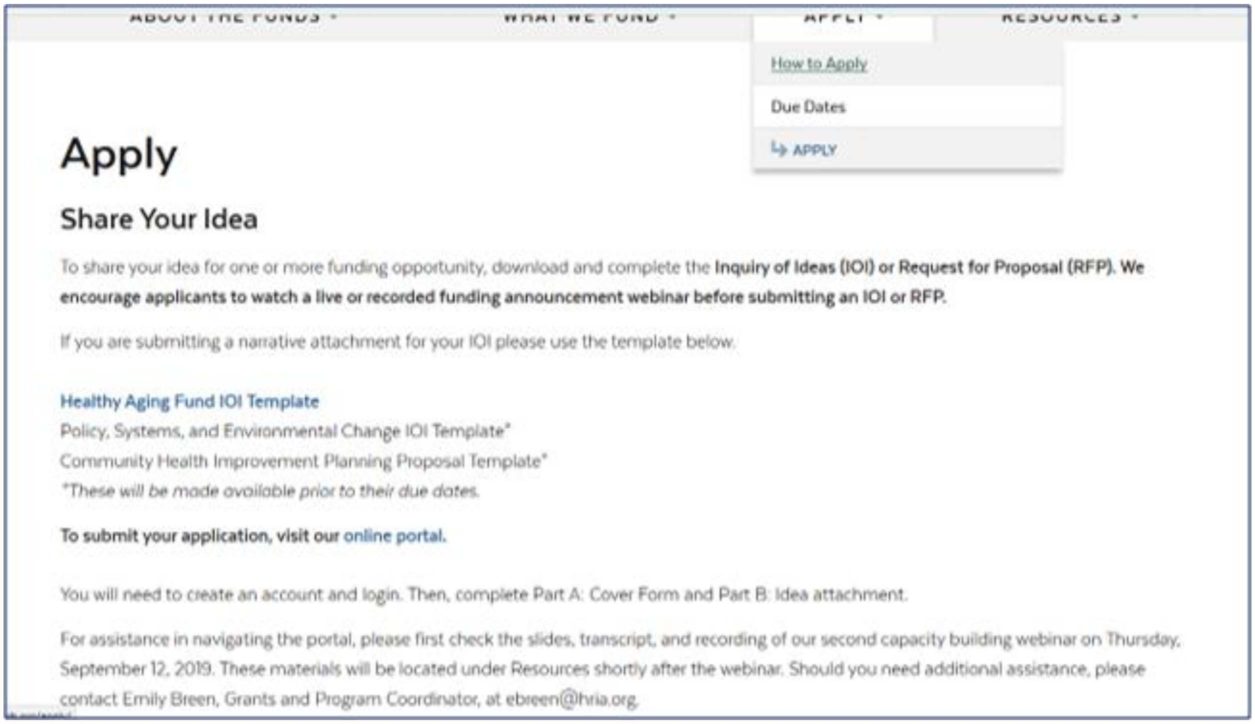
Other Tips
Then finally, a few additional tips that we'd recommend regardless of the medium that you are submitting. One is to ensure that your proposal is as clear and concise as possible. We know that time is always limited as you're pulling together these submissions but one tip that never hurts a submission - in fact probably helps it substantially - is if you have the time, consider asking a colleague who isn't as familiar with the idea or program to review it before you're submitting it and let you know if there are any key concepts that didn't come across as clearly. They can give some really valuable feedback at a peer level as we mentioned before. Really the meat of your submission is thinking about an idea developing and circulating the approach that you're going to have. We encourage you to spend the majority of your narrative in that section of your submission and what your organization will do. Reminders to spell out acronyms at least once. We certainly live in the world are many ways to shorten long phrases or terms but certainly let us know what these acronyms represent. Then, as a final step, spell check is a great feature to ensure that you've cleaned up and tightened your submission as much as possible. So, I'll now turn it over to the final section of our webinar and to my colleague Emily Breen. Thank you so much.

Section 5: Submitting Your Application

Hello everyone. You’ve probably spoke to me over email or in the webinar chat box but I'm really excited to be here today with you guys to go over how to actually submit your idea to the portal. I wanted to go through the basic steps to start. But I just wanted to point out one thing which is: we currently have the Healthy Aging application live. So, most of these steps will be similar across the three funding opportunities but just so you know that might look a little bit different based on which funding opportunity you're applying to. We'll use the Healthy Aging as an example.

These are the basic steps you follow. You are going to see the link on our website and go there to access the portal. Don't run there just yet, we're going to walk through how to go to the application. The next will be creating your account and logging in. Then you will complete a set of eligibility questions to enter the application. Just some important information and reminders. Then, once you get in the application, you'll be completing Part A which is the cover form that you've seen in the IOI. Then Part B, which is the inquiry of ideas submission or proposal submission for CHIP. Then you will be able to save and submit your application.

We want to show you what this looks like on our site. You can visit the Apply page and see the link to our online portal where you can go create that account that I was talking about.



How to Apply
Due Dates
APPLY

Apply

Share Your Idea

To share your idea for one or more funding opportunity, download and complete the **Inquiry of Ideas (IOI) or Request for Proposal (RFP). We encourage applicants to watch a live or recorded funding announcement webinar before submitting an IOI or RFP.**

If you are submitting a narrative attachment for your IOI please use the template below.

Healthy Aging Fund IOI Template
Policy, Systems, and Environmental Change IOI Template*
Community Health Improvement Planning Proposal Template*
These will be made available prior to their due dates.

To submit your application, visit our online portal.

You will need to create an account and login. Then, complete Part A: Cover Form and Part B: Idea attachment.

For assistance in navigating the portal, please first check the slides, transcript, and recording of our second capacity building webinar on Thursday, September 12, 2019. These materials will be located under Resources shortly after the webinar. Should you need additional assistance, please contact Emily Breen, Grants and Program Coordinator, at ebreen@hria.org.

So, the first step when you follow that URL is going to be this page. You will create an account which will look like this, and it will just ask for email and to create a password. Then you will be able to continue accessing the application from there.

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.

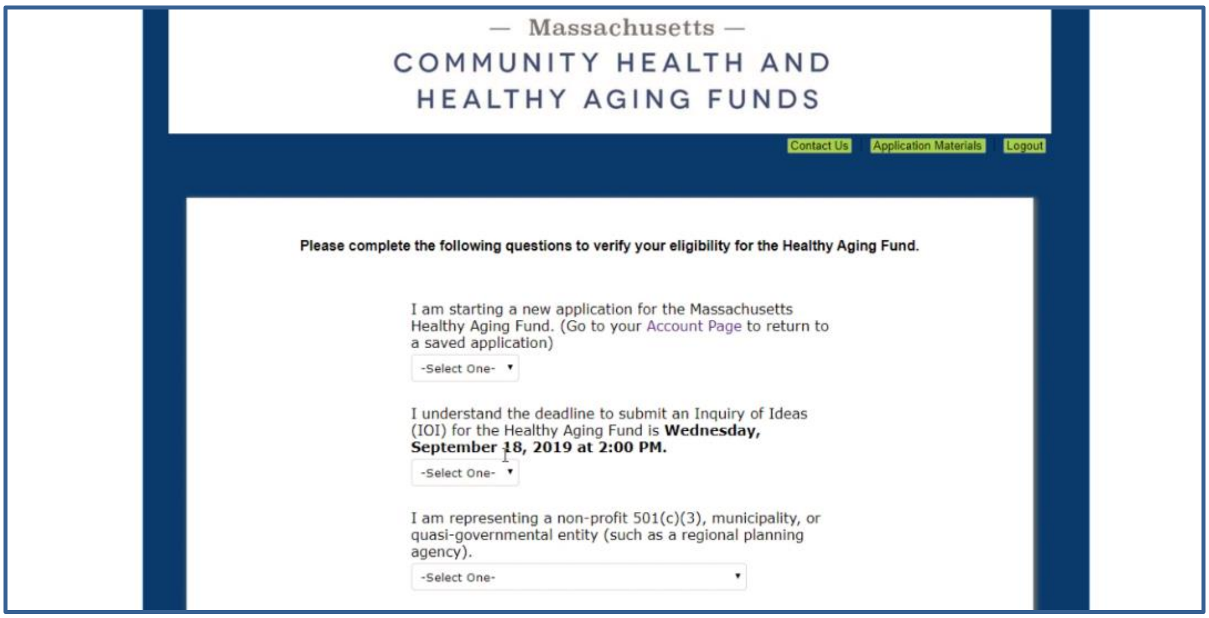
RETURNING Users: If you have an account, enter your email address and password to login.
If needed, click the "Forgot Password" link below to reset your password.

E-mail
Create an Account

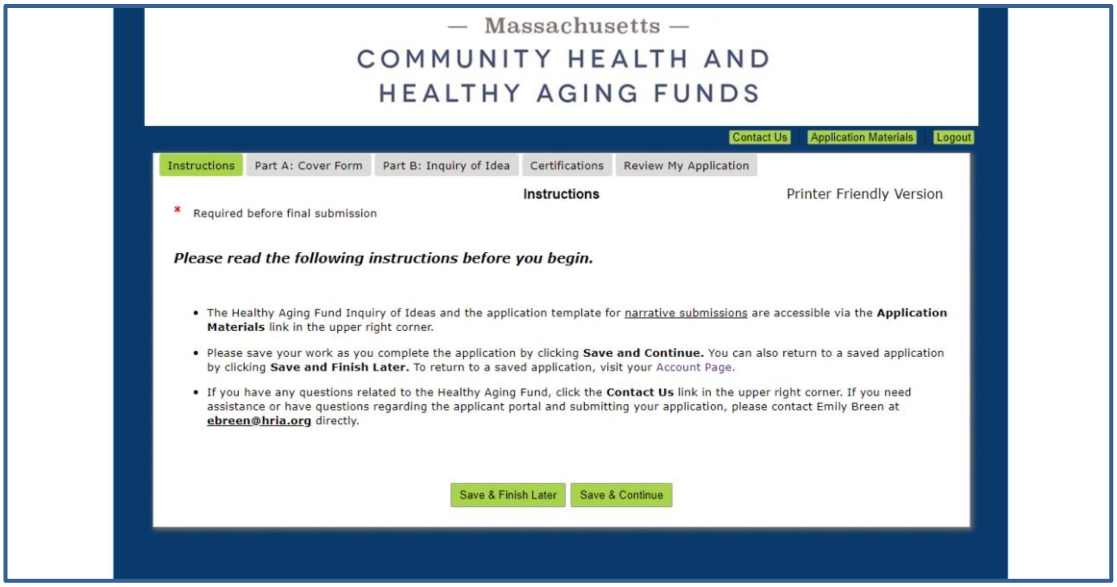
Password
Forgot Password?

Login

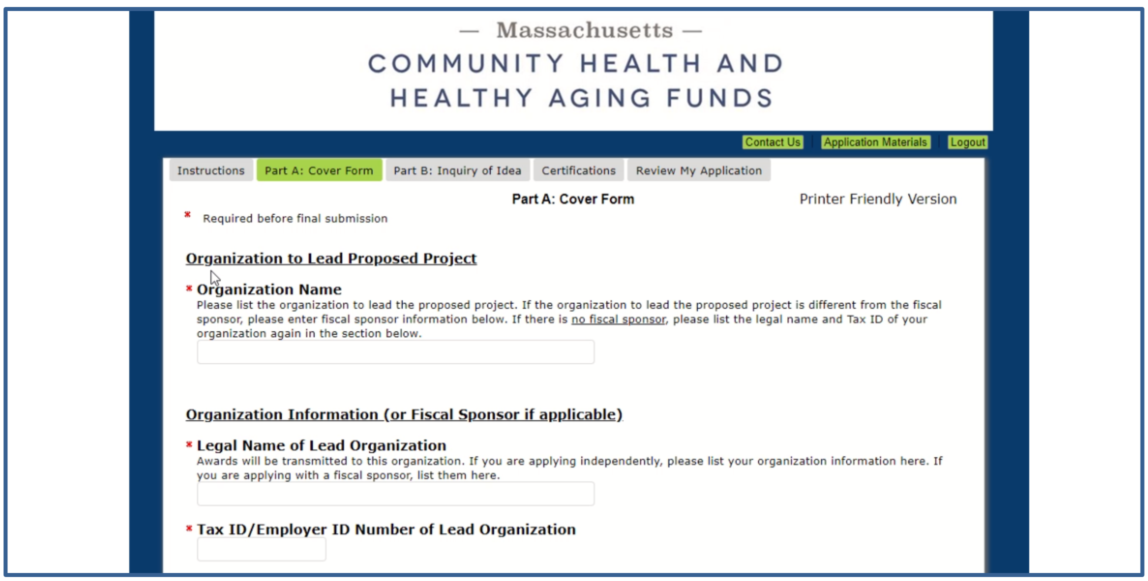
Once you log in, you'll be brought to this eligibility page, and here you will see some reminders like I said. Important information and eligibility criteria and you'll want to go through each one and select “Yes” to make sure that you are meeting these requirements. Here you can also select another option if you're applying with fiscal sponsor. You will need to select these to allow you into the application. And just so you can see it - if you do select “No” for one of them you will not be allowed into the application. So, if you select No on purpose that might mean that you don't meet all the eligibility criteria and you can reach out to our staff for further questions. But it might also mean you just selected it by accident. Just go ahead and go back to that login screen and start again.



So, I'm going to select Yes, and we'll move into the application. You'll be brought to the instructions page next and this shows you a couple of the important things you need to know before continuing through the rest of the application. So, we have here a link to the IOI or proposal and the application templates if you need them. That would be if you're submitting a narrative and you can link right up here in the application materials. One thing we recommend as you work through the portal is to open things in a new tab whenever you can and also to save your work as you go so that you're not losing anything. And that’s the next point here. You have the option of saving and continuing throughout your application or saving and finishing later. If you choose to save and finish later, you’ll go to your account page where you can go to your in-progress applications. Definitely bookmark that page so you can access it again but it’s also here in the application for you. And then lastly another important note is if you do have questions about the Healthy Aging Fund or whichever one you’re applying to there is a Contact Us link right up here. Otherwise, if you have questions related to actually submitting the application, technical assistance or anything like that, please contact me directly and I’ll be able to help you with those.

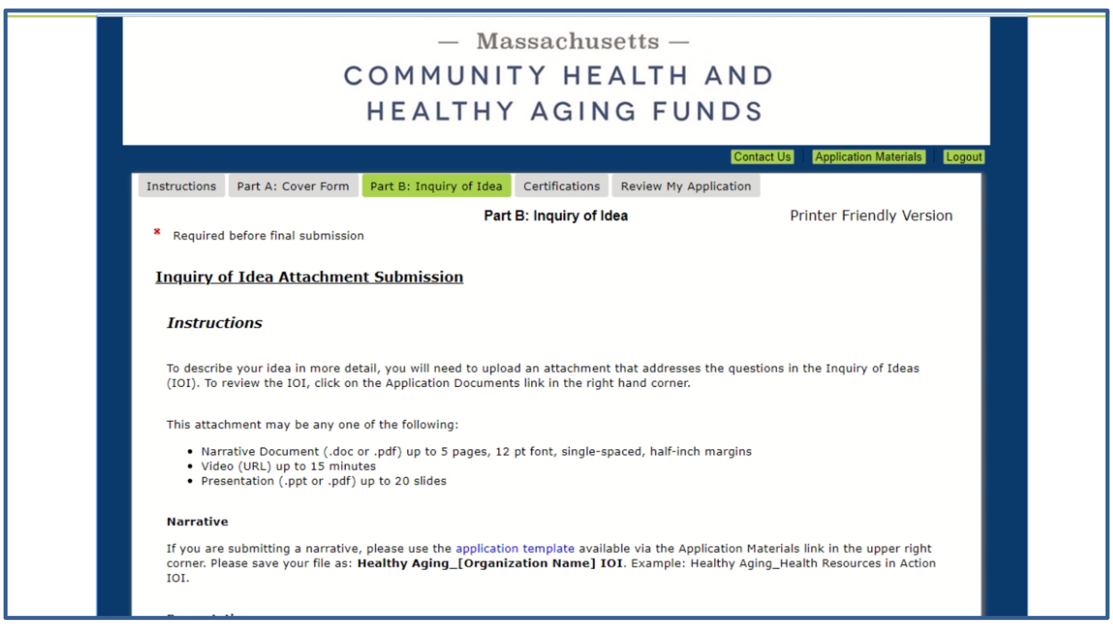


Once you've read these instructions go ahead and save and continue. Here's Part A - the cover form which you've seen on the IOI.



We'll walk you through what's here and any important things to remember. So, first is the organization to lead the proposed project. That should be whoever is applying. You'll also put your organization information below. However, if you have a fiscal sponsor you should put their information there. And these directions are all within the application for you. And then we ask for some contact information. So first the highest ranking official in your organization, whether it's CEO, Executive Director, etc. put that information there. And again, if you are applying with a fiscal sponsor you would put that information. Then moving down, the IOI primary contact information. So that's whoever is filling out this IOI so we can have in case we need to contact them. As you move down, you'll see the IOI details. If it's CHIP, you'll see the proposal details. So here for Healthy Aging you would select which Tier you're applying to and we have reminders for what those are. As you move down you have the Eight Domains of Age-Friendly Communities. Again, we have some links for you to review if you need them but as a reminder just try to open those in a new tab and save your work as you go so you don't lose anything. Another note is you can select more than one so feel free to select all that apply to your organization and your idea. And then the same thing for the SDoH and health outcome area. On the bottom here we have a couple additional questions. *Can we share your idea?* So, this is looking to promote collaboration and there's a description there for you to take a look at and you can choose yes or no. Lastly at the bottom is do you plan to submit an application to more than one funding opportunity and do you plan to submit more than one application to this funding opportunity. Just a note there - organizations are encouraged to submit their best idea within a funding opportunity but if you are submitting more than one, applicants should explain their rationale within the approach section of your application.

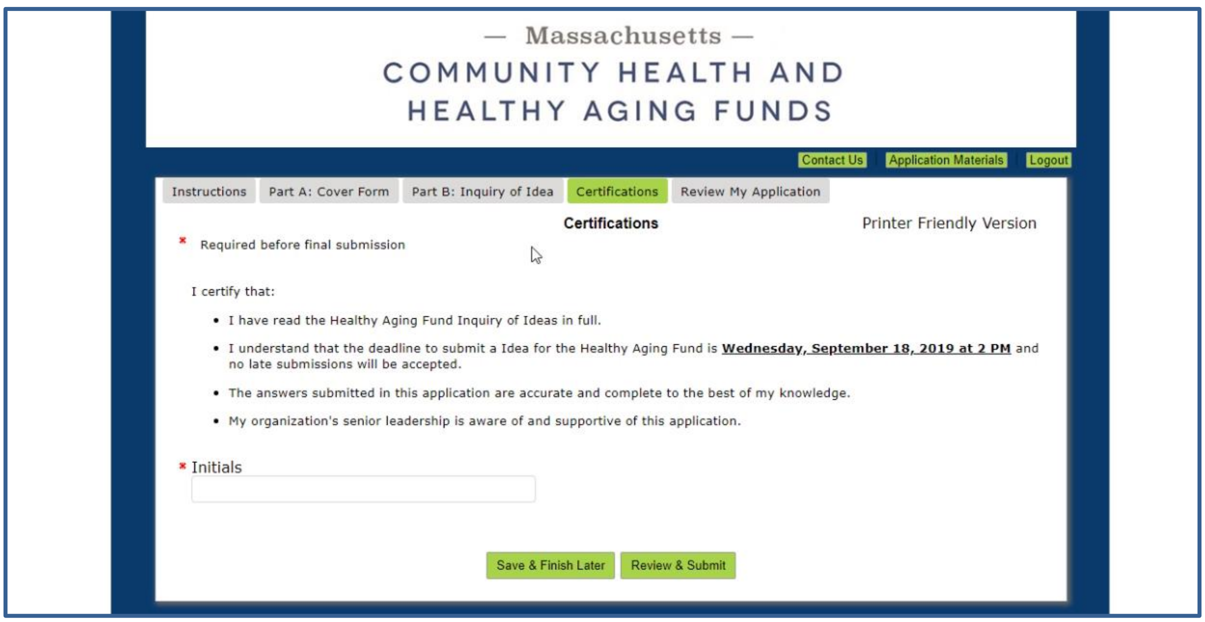
Once you've done all that you can go ahead and save and continue and you'll be brought to Part B. This is where you're submitting your attachment. So, we have some instructions at the top and a reminder of those limitations. And I just wanted to address - there was one question about the limitations for the narrative. So, it's up to 5 pages and then you'll see 12-point font, single-spaced, half-inch margins. We've provided a template for you on the website just to be able to stay in those guidelines and also to help our reviewers keep a really nice layout for them to read.



You'll see the link to the application template for the narrative. For PSE and CHIP those will be coming soon and they'll also be in the application as well. We also ask that you use this naming method to name your document. So, it would be whatever fund you're applying to so Healthy Aging underscore organization name IOI (or proposal if it's CHIP) so for example Healthy Aging_Health Resources in Action IOI. For a presentation if you're submitting that, there's no template but please still answer the questions in order just to help our reviewers go through them and use the same naming method as the narrative. And finally, for video we're excited to see if there's video submissions, if you are doing a video, we do recommend using YouTube so that you can maintain the privacy of your video and still share a link with us so the review team can see it. We've included some instructions for how to make that unlisted which is how you would be able to share that link with us. We definitely recommend YouTube but if you're having any issues with it, please reach out to us as soon as possible so we can work something out.

Finally, here we get to actually attaching the submission. So, if you're submitting the narrative or presentation you have the option here to choose your file and go ahead and upload. If not, you can submit your video URL here. Then we just ask that you verify which type of submission you've included just so it reminds you to include something and we know as well.

Once you do that, go ahead and continue. Last thing here is some certifications - we want to make sure you have read the IOI in full, you know the due date, the answers are submitted as best you can and as accurate as can be and then your organization's senior leadership is aware of and supportive of the application. We just ask that whoever is filling out the IOI initials there to continue to the last page.



One more thing to point out is that you can review your application to see everything you've filled out and make sure it's all correct. We definitely recommend doing that at least once to make sure everything looks okay. It will show you any of the fields that are missing, and you can go ahead and fill those in. Once you've done all that you can scroll to the bottom and go ahead and submit. Again, things cannot be changed after submitted so keep that in mind and make sure it's good to go. So those are basic of the application. I'm just going to go ahead and go back to our slides.

So just some reminders for you. When you log in to the portal, please do so as soon as possible now that the link is up on the website. We hope there is no significant technical challenges but if you do have them, we want to make sure we're addressing them as soon as possible. A reminder again that you can save your application and finish later so go in the portal, get used to it, and start completing the application. Then we definitely encourage you to submit before the 2 PM deadline. Another thing to keep in mind is that we'll be available as possible to answer questions until the deadline, but we may not be immediately available as the deadline approaches so just try to get those questions in as soon as possible.

Lastly, I just wanted to go through some final resources for you all. As a reminder if you've joined our other webinars you know about these three things. You can email any question you have to CHFund@hria.org and HealthyAgingFund@hria.org and we'll do our best to get back to you as well as add question to the FAQ page as often as we can. Then again you can sign up for a 15-minute phone session with us to provide any assistance with question you might have. And there's more information about signing up for those on the capacity building opportunities page of our website. Here is our webpage if you haven't seen it. If you visit www.mass.gov/mahealthfunds and you'll be able to link right to your home page.

Again, we just wanted to remind you of the upcoming deadlines. Health Aging is coming up on Wednesday the 18th at 2 PM and PSE will be Wednesday October 2nd at 2 PM. Finally, CHIP will close us out on Wednesday November 20th at 2 PM.

We just wanted to show you contact information again just to remind you. So, my colleagues Nineequa Blanding, Vice President of Grantmaking, Jennifer Lee who is the Managing Director for Grantmaking, and Kevin Myers who is the Program Office for the Community Health Fund are all available. As well as myself, especially if you have questions about the portal, please contact me directly. And then we also wanted to include our colleagues at the Department of Public Health. Ben Wood, who is the Director of Community Health Planning and Engagement and Liz Maffei who is the program coordinator there. So please feel free to reach out to any of us with questions or comments or anything like that.

We want to thank you for attending today's webinar. I hope it was helpful. Again, please contact me with any questions about the portal and we just want to thank you again for attending.