Application Guidelines
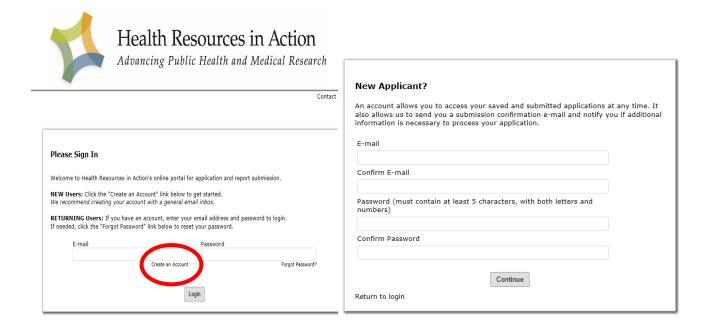## Getting Started
Start a new **PSE** application
Start a new **CHIP** application
Start a new **Healthy Aging** application

To continue a saved application, visit your Account Page

Navigating the Application Portal

To begin, click the application link for the funding stream you are applying to and create your account (if you do not already have one).

Once you create your account and login you will be brought to some eligibility reminders. NOTE: You Must select yes for all. Otherwise, you may not be eligible (or selected by accident) and the portal won't let you in. If this happens, go back to New Application URL and begin again.

Be sure to save your work as you go. You can Save and Continue to the next section or Save and Finish Later.

The links for starting a new application and continuing a saved application are different. To continue a saved application, you should **login to your Account Page**.

The Application Materials link in the application will bring you to the How to Apply page with links to all relevant materials. ***NOTE: Always be sure to save your work before following a link. Open links in new tabs to avoid losing work.***

Log into the online portal well before the deadline to create an account and familiarize yourself with its format. Consider submitting before the deadline if you're able, in case you encounter any challenges.

Required Documents
Proposal Document
Proposal document answering the application questions. Proposal can be in the form of a narrative document, slides, OR a video (you just have to submit 1). Below are maximum lengths for each type of document, and some recommendations for developing your proposal.

> Narrative (Maximum: 7 pages)
> - 12-point, Times New Roman font, 1-inch margins
> - Answer questions in order
> - Include the name of the applicant organization in the document footer
> - The word counts are meant as a guide
> - Save as Funding _Organization Name (Ex: PSE_Health Resources in Action)
>
> Slides (Maximum: 20 slides)
> - Answer questions in order
> - Title page includes the name of your project and the name of your organization
> - Use a font that is easily readable
> - Develop short sentences or a list of key points
> - Use art/design to help convey your message
> - Create clear labels for charts and graphs
> - Make slide backgrounds subtle and consistent
> - Use high contrast between background and text colors
> - Save as Funding Opportunity_Organization Name.
>
> Video (Maximum: 15 minutes)
> - Draft a script or outline for your video
> - If you are filming yourself speaking, try to find a steady surface to set the camera down, whether you are using a camera, phone, iPad, etc.
> - Light your recording area so it isn't too dark & maintain a clean background
> - Speak into a microphone to get clear audio
> - Record multiple takes of the video so you can choose different shots
> - Upload the video to YouTube and publish as "Unlisted" - for directions please visit the FAQ page under the Submitting Your Idea section. If you are having trouble with YouTube, contact MACHHAFunds@hria.org as soon as possible.
> - In the description, list the title of your initiative, name of your organization, and stopping points for each question. For example: Background: 3'15''

Proposal Document Tips
- Ensure your proposal is as clear and to the point as possible
- Consider asking a colleague who isn't familiar with your idea or program to review the proposal and give feedback
- Spell out acronyms at least once

Proposal Attachments
BUDGET: The budget form **is required.** You can access the budget form on our [webpage](#).

WORKPLAN/ACTIVITIES TEMPLATE: This is **required**. You can access the workplan on our [webpage](#).

Attachment Guidance: Budget
Completing the Budget Form
Please complete a budget page for each year that you are requesting funding. If you are not requesting 5 years of funding, leave the extra tabs blank.

For each line item, please provide a brief description or explanation. Please include information to show how the item connects to your proposed activities, and whether the line item is also covered by other funding sources.
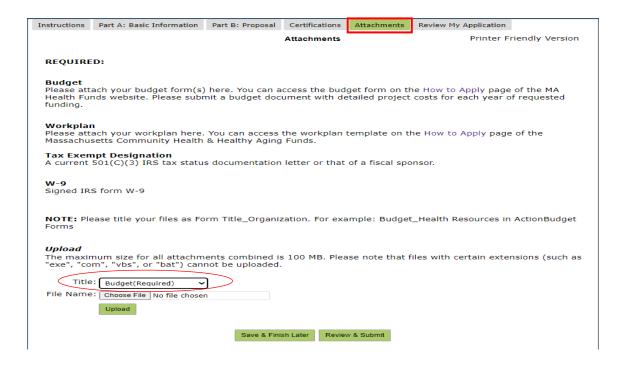
On the summary tab, please insert applicant name & number of years you are applying for. The Summary will auto populate. Please check to be sure it matches what you expect it to be. Otherwise, there may be an error somewhere in the spreadsheet. If there appears to be an error, please double check your entries. Reach out to Funds staff if you are still having any trouble.

When you finish the budget, be sure to **save your budget form and attach it to your application** in the online portal. To do so:
1. Please save the file with the funding stream you are applying to, your organization's name, and the type of attachment (Ex. *PSE_Health Resources in Action_Budget)*
2. Go to your saved application on your [Account Page](#).
3. On the Attachments page, add your budget document. Make sure file type is xls. or xlsx.

If you have questions or need support using the template, please email us at MACHHAFunds@hria.org

Components of the Budget Form

Employee Compensation - This includes any employee of the applicant organization who will work on the project or program.

Non-Employee Compensation* - This includes but not limited to non-staff individuals engaged in the project or program. These might include committee members, volunteers, focus group participants, and individual consultants.

Direct Operating Expenses* - Expenses related to the specific project or program. Examples include travel expenses, advertising materials, staff training, office supplies, and more. Expenses like these would not exist if the project or program did not exist.

Subcontracts* - If you are giving funds to other partners to do parts of the initiative, list here.

Indirect Rate – Expenses necessary to support an organization's general operations. Usually shared across projects or programs. Examples include rent and utilities, office furniture, computers, and IT systems. ***Applicants can request up to 20% for indirect costs.***

*Community Engagement – We would like to know how much funding is dedicated to community engagement activities. Next to each line item, please say if the cost is directly related to community engagement by choosing YES or NO. Community engagement can be defined in several ways and can range across a spectrum of public participation.

What to Include in Your Budget

We encourage applicants to develop a detailed, realistic budget with all project costs. We would also like to support you in considering equity within your proposed budget. We have prioritized 3 key areas which we recommend you budget for. These areas include: Evaluation, Capacity Building, and Compensation and Incentives.

Capacity Building/Funds Events – Awardees are expected to take part in learning opportunities and events. Please budget for funds to cover 1-2 staff to prepare for, take part in, and travel to these meetings, along with other travel-related expenses.

Event Type	# per year	Estimated Time
All Awardee Convenings	2	all day
Regional gathering or site visit	1	all day
1:1 TA Calls (Virtual)	4	1 hour
Learning Community Sessions (Virtual)	4	1.5 hours

Travel: Awardees should use the Federal mileage reimbursement rate to determine travel costs. The locations for events have not been determined. Assume a venue centrally located in Massachusetts.

Evaluation - We encourage you to allocate resources that will allow your organization or partnership to evaluate your initiatives. Generally, we recommend at least 10% of your annual project budget be dedicated to evaluation activities. This can be requested from the Funds or covered by other funding sources. Evaluation activities could be done by staff, an individual consultant, or another organization. Please see the RFP for expectations related to evaluation.

Compensation and Incentives – We encourage you to budget for in-depth community engagement. When compensating community members (those who are not paid staff by the organization or subcontractors) for their time, we recommend the following:
- A minimum payment or incentive amount of $25/hour or at least a living wage in your region. We encourage paying individuals with an extra role, such as a meeting facilitator, at a higher rate. We encourage paying individuals with an extra role, such as a meeting facilitator, at a higher rate.
- Translation, interpreting, childcare, and transportation reimbursement offered to support participation in events.

Attachment Guidance: Workplan/Activities Template
Completing the Workplan/Activities Template
Please complete the Activities Template for your initiative. Please include at least 3 main activities that you are proposing to do with this funding.

When you finish the Workplan/Activities Template, be sure to **save and attach to your application** in the online portal. To do so:
1. Please save the file with the funding stream you are applying to, your organization's name, and the type of attachment (Ex. *PSE_Health Resources in Action_Workplan*)
2. Go to your saved application on your Account Page.
3. On the Attachments page, add your workplan document. Make sure file type is .doc or .docx or .pdf

If you have questions or need support using the template, please email us at MACHHAFunds@hria.org

Components of the Workplan/Activities Template
Activities – Brief outline of each major activity you plan to do for this initiative.

Timeframe – The expected year and months/quarter that you anticipate doing each activity.

Activity Lead – Who will lead this activity, including individuals (if applicable), group, or organization.

Community Engagement – More information about how the community will be engaged in each given activity.

Final Submission Checklist

Proposal Submission (must include 1)
- ☐ Narrative (file type .doc, or .docx)
- ☐ Presentation (file type .ppt, or .pptx)
- ☐ Video (URL)

Required Attachments (must include ALL)
- ☐ Budget (file type .xls, or xlsx)
- ☐ Workplan (file type .doc, or .docx, or.pdf)
- ☐ Tax Exempt Designation (file type .pdf, or .png, or .jpg)
- ☐ W-9 (file type .pdf, or .png, or jpg)