

APPLICANT

HUB

Budget and Work Plan Templates



Before we dive in... Watch these!



- Funding Announcement
- Understanding Our Approach:
 - PSE Change
 - Health & Racial Equity
 - Community Engagement



This session will...

1

Understand and apply Work Plan and Budget guidelines

2

Use required templates effectively

3

Align your proposed Budget with your Work Plan and project goals.



Work Plan Guidelines

- Demonstrates how you'll **implement your approach**.
- List and describe at least **3 major activities** you will undertake.
- Complete **details not required**; estimates are okay.
- Our team will help you refine your work plan if awarded.
- *Template Format: Downloadable Word document*
- *Submission Format: PDF*



Work Plan Template

Work Plan Template



— Massachusetts —
COMMUNITY HEALTH AND
HEALTHY AGING FUNDS



<p>Activities</p> <p><i>Minimum 3 major activities that will contribute to the project goal</i></p>	<p>Timeframe</p> <p><i>Which fiscal year and quarter <u>this activity will occur</u>.</i></p>	<p>Community Engagement</p> <p><i>Highlight how the activity would engage the target/priority community.</i></p> <p>(1) Who influences? (2) Who makes decisions? (3) Where does this activity fall in the <u>public participation spectrum</u>?</p>	<p>Anticipated Outcomes</p> <p><i>List changes anticipated from the activity</i></p> <p><i>Identify the Policy, System and/or Environmental (PSE) change approach for each key project outcome</i></p>
<p><u>Ex:</u> Quarterly steering committee meetings with lived experience community members and local coalitions</p>	<p><u>Ex:</u> FY27 Q1, FY 28 Q1, FY29 Q1, FY 30 Q1, FY 31 Q1</p>	<p>Ex: Targeted communities are involved in designing and providing feedback to improve the process</p>	<p>Ex: Increase community involvement and diversity</p>

Budget Guidelines

- Submit a budget **covering all years of requested funding.**
- Ensure **alignment between the Work Plan and Budget.**
- For each line item, **include a brief description** linking it to proposed activities.
- The **limit for indirect costs is 20%** of direct costs per year.
- **Future year costs can be estimated**; amendments to line items are allowed as needed, not your budget amount.
- *Template Format: Downloadable Excel document*
- *Submission Format: Excel document*



Budget Considerations

- **Capital expenditure are ineligible**, e.g., purchasing equipment for building a greenhouse or research of any kind.
- **Reflect equity** in how you build capacity for the work and how you engage with partners
- Include **resources for evaluation** to improve outcomes, at least 10%
- Budget for **community engagement compensation** and incentives



Example Budget

A	B	C	D	E	F	G	H	I	J
	MA CHHA FUNDS PROPOSED BUDGET								
	Applicant:					Total Requested	\$ 299,976.00		
	Line Item	Y1 Amount	Y2 Amount	Y3 Amount	Y4 Amount	Y5 Amount	TOTAL		Explanation
	Staff/Personnel Costs								
	Example: Program Manager	\$ 22,000.00	\$ 23,000.00	\$ 24,000.00	\$ 25,000.00	\$ 26,000.00	\$ 120,000.00		
	Example: Project Assistant	\$ 4,000.00	\$ 10,000.00	\$ 12,000.00	\$ 12,000.00	\$ 14,000.00	\$ 52,000.00		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	Example: Fringe @ 28%	\$ 7,280.00	\$ 9,240.00	\$ 10,080.00	\$ 10,360.00	\$ 11,200.00	\$ 48,160.00		
	Non-Employee Compensation								
	Example: Community Leader Stipends	\$ -	\$ 1,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 7,000.00		
	Example: Event Speaker Honoraria	\$ -	\$ -	\$ 800.00	\$ -	\$ -	\$ 800.00		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	Program/Operating Costs								
	Example: Translation services	\$ -	\$ 700.00	\$ 1,500.00	\$ 500.00	\$ 500.00	\$ 3,200.00		
	Example: Printing and materials	\$ -	\$ 200.00	\$ 1,000.00	\$ 200.00	\$ 200.00	\$ 1,600.00		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
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		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	Partners/Subcontracts								
	Example: Local community partner	\$ 7,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 47,000.00		
	Example: Evaluation contractor	\$ -	\$ -	\$ 7,000.00	\$ 10,000.00	\$ 10,000.00	\$ 27,000.00		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
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		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
	SUBTOTAL: DIRECT COSTS	\$ 33,000.00	\$ 44,900.00	\$ 58,300.00	\$ 59,700.00	\$ 62,700.00	\$ 258,600.00		
	INDIRECT COSTS (No more than 20%)	\$ 5,280.00	\$ 7,184.00	\$ 9,328.00	\$ 9,552.00	\$ 10,032.00	\$ 41,376.00		
	TOTAL	\$ 38,280.00	\$ 52,084.00	\$ 67,628.00	\$ 69,252.00	\$ 72,732.00	\$ 299,976.00		

Budget FAQ

- **What is the maximum amount of each grant type and award? If we are applying in partnership with another organization, can we request more funds?**

The maximum amount for each funding stream is:

- **Planning Grant:**
 - *Up to \$50,000 per year for 1-2 years (PSE, Healthy Aging, and CHIP)*
- **Full Grant:**
 - *PSE: \$200,000 per year, 3-5 years*
 - *Healthy Aging: Up to \$100,000 per year, 3-5 years*
 - *CHIP: \$375,000 total for 3-5 years*



Budget FAQ

- **Does the amount we request need to be tied to our organization's annual operating budget?**

No, the amount you request is not tied to your organization's annual budget. However, one of the four review criteria is feasibility. Please outline a realistic budget for the activities you are proposing and include context for why this project is feasible for your organization.

- **Can funds support general operating costs?**

No, funds cannot be used solely to support general operating costs. This grant seeks to fund approaches and activities that address the root causes of health inequities through PSE change approaches.



Contact Us!

- Website: <https://mahealthfunds.org/>
- Questions: MACHHAFunds@hria.org
- For technical support with the SmartSimple portal, email grants@hria.org and use “MACHHAF” in the subject line.

