Stockton Housing Innovation Fund 2024

San Joaquin Community Foundation

Program Overview and Information

THE SAN JOAQUIN COMMUNITY FOUNDATION is pleased to invite eligible organizations to submit proposals for grant funding from the **Stockton Housing Innovation Fund** (SHIF). SHIF was created as a community-designed and driven source of financing. It is intended to be responsive to local housing needs and invest directly into the Stockton community with the overall goal of reducing housing insecurity. The Stockton Housing Innovation Fund moves toward this goal by supporting local, impactful, and innovative solutions with funding to improve housing access and outcomes.

SHIF has three areas of focus, which were developed by a Design Team composed of nine (9) individuals with diverse lived experience and expertise on housing in Stockton. In 2022, they developed a Design Report, which outlined the goals and focus for this funding. In phase 3 of the design process, the Design Team and facilitators (JSI and Reinvent South Stockton Coalition) solicited applications for the Community Oversight Board which required one-third of members be representative of the community with lived experiences as long-time renters, being unhoused, residents in affordable or public housing, those who have purchased their first home in Stockton and/or those who participate in grassroots advocacy initiatives.
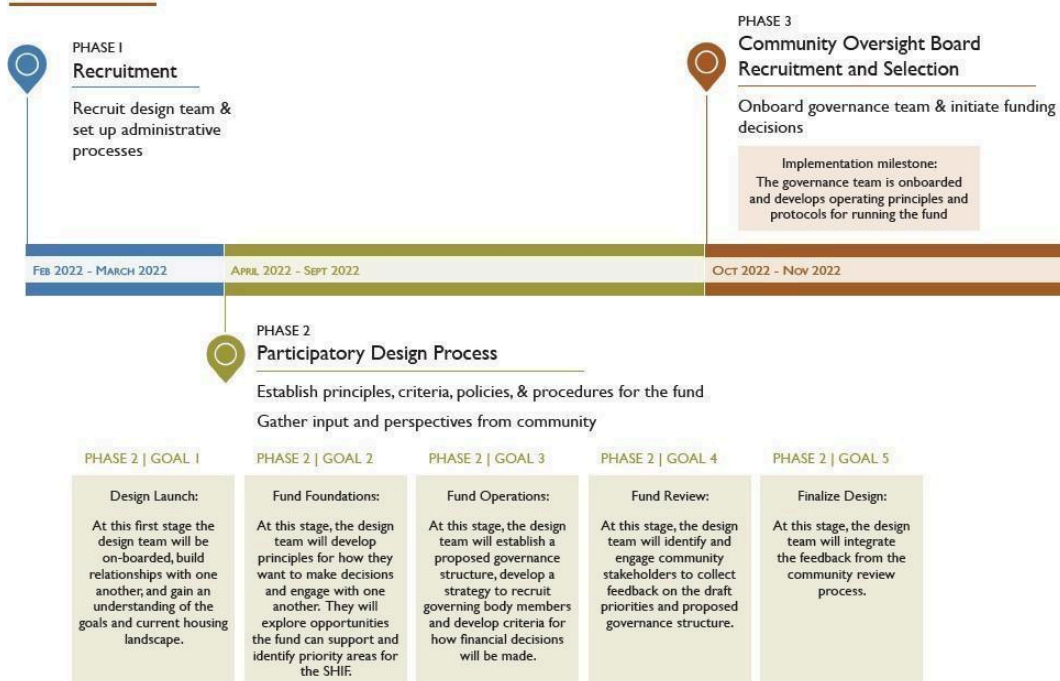

Figure 1 – Design Team Process, JSI

Grants from SHIF are available to fund projects and activities that serve low to moderate-income people living in the City of Stockton, and directly align with one or more of the SHIF's areas of focus: *improving local capacity around affordable housing, innovative solutions to address housing insecurity, and addressing racial disparities in current housing systems.* For 2024, SHIF is accepting requests for eligible projects from all three areas of focus.

FUNDING FOR 2024

The Chan Zuckerberg Initiative (CZI), James Irvine Foundation, and The California Endowment have generously provided a total of **$350,000** to be regranted by the San Joaquin Community Foundation for this grant program in 2024. Additional funds may be made available during this round of funding. The maximum amount an applicant may request under this program is **$75,000** although applicants may request less than the maximum amount.

TIMEFRAME FOR USING GRANT MONIES
The timeframe to expend grant monies is one calendar year from the date of signed contract.

REPORTING REQUIREMENTS
Those organizations receiving grant awards will be required to submit minimal mid-year progress and final reports, as well as a financial report.

ELIGIBILITY CRITERIA
All organizations applying for SHIF funding must serve low and moderate-income households within the City of Stockton. The San Joaquin Community Foundation will accept applications from the following organizations:

- Non Profit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code.
- Institutions of higher education
- Public housing authorities/Indian housing authorities
- Special district governments
- Native American tribal governments (Federally recognized)
- Native American tribal organizations (other than Federally recognized tribal governments)

SHIF GOVERNANCE AND SELECTION PROCESS
This fund is governed by a Community Oversight Board (COB) of nine local residents with lived and professional experience around housing insecurity and affordable housing initiatives in Stockton. Proposals will be reviewed and scored by the SHIF Community Oversight Board with a goal of funding a minimum of one application within each focus area, listed below. Awards will be made by the San Joaquin Community Foundation's Board of Directors, based on recommendations provided by the Community Oversight Board. Decisions made by the Board of Directors are final.

AREAS OF FOCUS

The San Joaquin Community Foundation will accept applications from eligible organizations that propose projects or activities that serve low to moderate-income residents of Stockton and directly align with one or more of the SHIF areas of focus (developed by the SHIF Design Team) below. Projects may address more than one of the focus areas, but organizations will be asked to select one as the main focus in the application. Funding requests can be for new or ongoing projects or activities.

- **DEVELOP LOCAL CAPACITY AROUND AFFORDABLE HOUSING**
- **INNOVATIVE SOLUTIONS TO ADDRESS HOUSING INSECURITY**
- **ADDRESSING RACIAL DISPARITIES**

Preference in the application review process will be given to funding projects within the above areas of focus. Example activities that can be funded include applications that address one or more of the following (this list is not exhaustive):

- Support unhoused or housing insecure families to find/keep housing
- Create opportunities for transitional housing for unhoused individuals
- Assist populations with high rates of homelessness, such as LGBTQIA+ and foster youth, to find and keep housing
- Reduce barriers for housing development and promote policies to support unhoused and housing insecure Stocktonians
- Advance a community-centered housing agenda and build resident support for solutions
- Increase access for more local organizations and companies to the competitive funding landscape
- First-time homeownership
- Increasing supply of affordable housing
- Prevent and/or addressing ongoing displacement
- Address needs of the unsheltered population
- Emergency preparedness and response (as it relates to housing stability and security)
- Explicitly address decades of discriminatory housing policy by empowering the most affected residents to shape current policy
- Support local CBOs that advance the interests of communities of color
- Remove systemic barriers that make it difficult for groups of residents to access housing and support

RESTRICTED USES

Proposals that include the following restricted uses will not be considered by the San Joaquin Community Foundation:

- Lobbying that seeks to influence legislation.
  - While organizations as a whole are not prohibited from engaging in lobbying activities to support their overall mission and goals, activities funded with SHIF proceeds cannot be tied to any direct lobbying activities around specific candidates or legislation at any level.
- Any activities that would violate the law and/or public policy.

Below is the approximate timeline for application submissions. The Foundation will contact applicants by email. Organizations receiving awards will likely have contracts approved within 2-3 weeks after announcements. The full amount of funding will be sent to organizations approximately 2-3 weeks after contracts are signed.

SHIF Application Opens	**Tuesday, June, 11, 2024**
"How to Apply" Workshop	**Thursday, June 20, 2024 at 3:00 p.m.**
Application Submission Deadline	**Monday, July 15, 2024 at 5:00 p.m. (PDT)**
Community Oversight Board (COB), Application Review Period	**July 16-July 31, 2024**
Round 2 Awards Announced to Grantees (following the San Joaquin Community Foundation Board of Directors Meeting)	**Friday, August 9, 2024**
Contracts Signed and Funding Awarded	**Late August 2024**

SCORING

Proposals will be reviewed by the SHIF Community Oversight Board. Any organization applying for funding with staff or board members currently on the Community Oversight Board are eligible to apply. COB members who are staff or board members of an applying organization will not score applications from those organizations to avoid conflicts of interest. Award recommendations will be finalized by the San Joaquin Community Foundation Board of Directors. All proposals must meet the following Threshold Requirements:

Threshold Requirements:
- Meet eligible applicant criteria
- Proposed projects serve low to moderate-income residents in the City of Stockton
- Proposed activities fall within one of the three focus areas:
    - **Focus Area 1**: Develop Local Capacity Around Affordable Housing
    - **Focus Area 2**: Local Housing Impact
    - **Focus Area 3**: Addressing Racial Disparities

Proposals that do not meet the threshold requirements will not be scored.

Proposals will be scored on a 50-point scale with the opportunity for applicants to earn up to two (2) additional priority points based on BIPOC leadership and governance structure.

SUBMISSION PROCESS

Step 1: Assess Eligibility	• Review the eligibility criteria listed in the Stockton Housing Innovation Fund (SHIF) Application o Questions about an Applicant's eligibility may be sent to Brenda Amboy at bamboy@enterprisecommunity.org
Step 2: Review the Application	• Read the entire SHIF Application to understand submission details and requirements.

Step 3: Create a Grant Lifecycle Manager Account	● Register for a free Grant Lifecycle Manager Account by going to the following website: https://www.grantinterface.com/Home/Logon?urlkey=cfsanjoaquin ● You can use your existing login with SJCF if you have applied for a grant with us before. To create a new account, click on "Create New Account" to complete the account setup process.

Step 4: Prepare & Submit proposal in Grant Lifecycle Manager	● Follow these steps to access and submit the application:
	  1. Go to website: https://www.grantinterface.com/Home/Logon?urlkey=cfsanjoaquin
	  2. Enter Username (email address) and Password.
	  3. Click on "apply" at the top left of the screen next to the home icon.
	  4. This application will appear. Click on blue "Apply" button to begin the application process or to return to draft application.
	● Answer all application questions in Grant Lifecycle Manager.
	● Carefully review responses before submitting. Applicants will not be able to make edits once the proposal is submitted.
	● Submit proposal prior to the deadline to avoid potential issues.
	● Proposals must be submitted in Grant Lifecycle Manage **by 5:00 pm PDT on Monday, July 15, 2024**.
	● After submission, Grant Lifecycle Manager will provide Applicants with a confirmation message, a copy of the full application and a unique ID number will be sent to the email associated to the Grant Lifecycle account.

REQUEST FOR TECHNICAL ASSISTANCE

Requests for technical assistance with using the online grant portal must be submitted in writing by e-mail to George Lorente at glorente@sanjoaquincf.org with the subject line "Stockton Housing Innovation Fund". For any other questions related to the Stockton Housing Innovation Fund, please contact Brenda Amboy at bamboy@enterprisecommunity.org.

SHIF 2024 - Application Questions

Eligibility Criteria

Name of applicant organization.*

Please state the name of the applicant organization applying for grant funding.

Character Limit: 100

Federal employer identification number (EIN)*

Please provide the federal employer identification number (EIN) of the applicant organization. If you do not have a federal EIN, please provide your organization's tax ID number.

Character Limit: 20

Eligible Applicants:*

Please confirm your organization meets the following requirements (both criteria must be met to be considered an eligible applicant):

Choices

- Nonprofit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code.
- Institutions of higher education
- Public housing authorities/Indian housing authorities
- Special district governments
- Native American tribal governments (Federally recognized)
- Native American tribal organizations (other than Federally recognized tribal governments)

Organizational Readiness and Project Feasibility

Name of project*

Please state the name of the project you are requesting funding for (this is the name that would be used to identify the project to the general public.)

Character Limit: 250

Project and funding request*

Please provide the review committee a comprehensive description of your request summarizing your project,, project timeline, and an overview of how grant funds would be used. Funding request cannot exceed $75,000.

Character Limit: 1500

SHIF funding request*

Enter the funding amount being requested. Funding request cannot exceed $75,000.

Character Limit: 20

Organizational background*

Please explain how and why the applicant organization is qualified and relevantly positioned to perform the work it is proposing to undertake in this grant. This can include past accomplishments that are relevant to this project.

Character Limit: 1500

Partnering organization(s)

If the applicant organization is also partnering with other organizations on this project, please list the names of those partners, specify whether they are a nonprofit or other type of agency, state their role, and list any key qualifications. If there are no partnering organizations, please skip this question.

Character Limit: 1500

Key people assigned to the project*

Please identify the key people (staff and/or volunteers) who will be assigned to this project, state their role, from which organization they are associated (yours or a partner organization), and any relevant qualifications they have for the project.

Character Limit: 750

Project Background*

Please select the primary area where your project's resources will be focused. Your project may address more than one area, but for the sake of this application, you may only select one.

Choices
- Develop local capacity around affordable housing
- Innovative solutions to address housing insecurity
- Addressing racial disparities

Project Outcome(s)*

What is the specific outcome(s) you hope to achieve (outcomes are the difference you hope to make as a result of your project.)

Character Limit: 750

Local Housing Impact

Problem statement and alignment with Stockton Housing Innovation Fund*

Please state the problem that the project hopes to address, and how the project aligns with one or more of the Stockton Housing Innovation Fund's area(s) of focus: improving local capacity around affordable housing, innovative solutions to address housing insecurity, and/or addressing racial disparities in current housing systems.

Character Limit: 1500

Innovative Impact*

The Stockton Housing Innovation Fund (SHIF) was designed to be a tool that can help contribute to local funding gaps and is intended to support innovative approaches toward improving housing outcomes within Stockton. Please describe what makes this proposal innovative (e.g. strategy, partnerships, target audience, impact, etc.)

Character Limit: 1500

Check the box(es) next to the groups your project will primarily serve*

You may select more than one, but please check the boxes of the groups who will "primarily" benefit from the project.

Choices

- BIPOC (Black, Indigenous, People of Color)
- Disabled
- Seniors
- LGBTQ+
- Homeless and/or unsheltered
- Low-income individuals
- Farmworkers
- Veterans
- Youth/Foster Youth
- Other

Target population description*

Please expand on any specific groups of individuals this proposed project will serve/target (e.g., specific demographic groups or geographic communities) and briefly state your rationale for targeting that/those group(s). If you selected "other," please include a description here.

Character Limit: 750

Number of individuals to be served*

Please approximate how many individuals will be directly served by this project during the time period **August 2024 – July 2025** (i.e., how many clients/residents do you expect to serve)

Character Limit: 250

Measuring Success

Success indicators-quantitative*

What are the specific indicators/metrics you plan to track? Indicators are the values you track to measure your outcomes. Typically, indicators are a quantitative way to track progress towards your intended outcomes (i.e., number of people housed, additional funding secured, number of staff hired, etc.).

Success indicators-qualitative*

What are the qualitative indicators you will track? (i.e., increased community understanding of housing policies, developing relationships between Community Based Organizations and Government/Philanthropic partners, cross-sectoral partnerships, etc.). How will you capture and share that information?

Character Limit: 750

If you foresee obstacles or challenges to making the project happen, list those here.

If this question does not apply to you, please skip this question.

Character Limit: 750

Proposal Budget

Project Budget*

Please provide a proposed budget for this project. For convenience and use, an example of a project budget template has been provided in the link below. This is only an example, and the applicant should feel free to download and customize it as is applicable to the project. You may also upload your own existing budget template (be sure to include the budget information listed in the template.)

Budget Template

Note on funding status: When listing sources of income for this project, be sure to indicate sources that have been secured, that you have applied for already, and that you plan to apply for in the future. For matching funds, please indicate the funding sources and whether the matching funds are in-cash or in-kind support. For in-kind support, specify how it is being calculated.

File Size Limit: 10 MB

If you do not receive full funding through this grant request, will the project still happen?*

Choices
- Yes
- No
- Unsure

If you do not receive full funding through this grant, where will additional funds come from?*

Choices
- We will continue applying for grants and/or solicit donations from donors
- We will redirect funds from our existing budget to offset the funding gap
- We will continue applying for grants and redirect funds from our existing budget
- We will make changes to the budget and work with the funding we have
- We do not know what will happen

Project sustainability*

Please describe your plans to support this project financially in the future, beyond the proposed grant funding period, if any. Please share any plans to grow the project in the future, if applicable. If this project will not continue, or if you are unsure, you may skip this question.

Character Limit: 750

List your organization's project funding sources for the current fiscal year*

Please list the top project funding sources for your organization's current fiscal year with the corresponding dollar amounts. Please specify any restrictions tied to each funding source (example: $10,000 from Foundation X for unrestricted use, $5,000 from a Private Donor to provide scholarships, $2,500 for sponsorship of the XYZ event, $1,000 from Jane Smith for unrestricted use, $500 from Business Y to support the ABC program, etc.)

Character Limit: 750

Priority Points

Applicants are eligible to receive up to two (2) priority points. Additional points may be awarded if proposals are submitted by eligible organizations that are Black, Indigenous, and People of Color (BIPOC)-led and/or have a majority (51%) BIPOC governing body. Please indicate whether your organization is:

- **BIPOC-led (1 point)**
    - o Can include various titles including, but not limited to, Executive Director, CEO, President, etc.
- **Majority (51%) BIPOC governing body (1 point)**
    - o This can include Board of Directors, Steering Committee, etc.

Choices
BIPOC-led (1 point)
Majority (51%) BIPOC governing body (1 point)

Letter(s) of Support (Optional)

You may choose to submit any letters of support for your project as electronic attachments in MS Word (.doc or .docx) or Adobe PDF (.pdf) format. There are no word, page length, or font size restrictions. Please combine multiple letters into a single file to upload. Letters of support are not required.

File Size Limit: 10 MB

Applicant Acknowledgment

Please mark here to indicate that the applicant has read and understands the Stockton Housing Innovation Fund's 2024 Grants Program and Eligibility Criteria, is aware that not all applicants will receive funding, funding reports will be requested, and that the information contained in this Grant Request is true and correct.

Choices
The applicant hereby acknowledges the above.