



Stockton Housing Innovation Fund

“How to Apply” Workshop

Wednesday, April 8, 2026



Agenda

Introductions (5 mins)

SHIF Background (10 mins)

SHIF Scoring Rubric (5 mins)

“How to Apply” to SHIF (25 mins)

Q+A (15 mins)



Introductions



San Joaquin Community Foundation



**Amy
Portello Nelson**
*Chief Strategy & Impact
Officer*



**Alfonso
Villalobos**
*Grants & Scholarships
Associate*



Enterprise Community Partners

Central Valley Team



Kristine Williams
Associate Director



Brenda Ward (Amboy)
Program Manager

“Enterprise Community Partners is a national nonprofit that exists to make a good home possible for the millions of families without one.”



SHIF Background



SHIF Background



PHASE 2 | GOAL 1

Design Launch:

At this first stage the design team will be on-boarded, build relationships with one another, and gain an understanding of the goals and current housing landscape.

PHASE 2 | GOAL 2

Fund Foundations:

At this stage, the design team will develop principles for how they want to make decisions and engage with one another. They will explore opportunities the fund can support and identify priority areas for the SHIF.

PHASE 2 | GOAL 3

Fund Operations:

At this stage, the design team will establish a proposed governance structure, develop a strategy to recruit governing body members and develop criteria for how financial decisions will be made.

PHASE 2 | GOAL 4

Fund Review:

At this stage, the design team will identify and engage community stakeholders to collect feedback on the draft priorities and proposed governance structure.

PHASE 2 | GOAL 5

Finalize Design:

At this stage, the design team will integrate the feedback from the community review process.



Roles

San Joaquin Community Foundation

- Fiscal administrator for SHIF
- Provide guidance on compliance and monitoring requirements
- Manage apps and contracts
- Share RFP widely

Enterprise Community Partners

- Facilitate RFP design process
- Draft RFP materials
- Draft scoring criteria
- Evaluate program

Community Oversight Board

- Elevate community priorities
- Approve RFP language & process
- Score applications
- Approve conditional award allocations



SHIF Overview

Fund Purpose: The Stockton Housing Innovation Fund (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. The Stockton Housing Innovation Fund has consistently awarded funding aligned with the original goals of **improving local capacity around affordable housing, investing in innovative solutions to address housing insecurity, and addressing racial disparities in current housing systems.**

Total Funding Amount: \$375,000 minimum

Maximum Award Amount: \$75,000 maximum (applicants can request less)

Application Due Date: May 11, 2026 at 5pm



Focus Areas

Production

Increasing affordable housing production

Preservation

Preservation or rehabilitation of existing affordable housing

Prevention

addressing housing insecurities with a focus on anti-displacement, prevention of eviction, and fair housing

- For a list of example activities, please see the RFP
- Applicants will be asked to select one Focus Area when submitting an application
- Organizations can submit separate applications for the different focus areas but they can only be awarded one grant.



Applicant Eligibility

Eligible Applicants:

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)



Ineligible Expenses

Expenses not associated with achieving the program's goals and those prohibited by the Internal Revenue Service will be ineligible. If awarded a grant, the following expenses are not allowed to be paid by this funding:

- Retroactive payments of expenses before the start of the grant period.
- Expenses after the end of the grant period, unless a no-cost extension has been requested by grantee and approved by the San Joaquin Community Foundation.
- Expenses spent on services for projects/residents outside of Stockton.
- Expenses inconsistent with IRS Code Section 501(c)(3).
- Exemption requirements - 501(c)(3) organizations
- Inurement/private benefit: Charitable organizations
- Restriction of political campaign intervention by Section 501(c)(3) tax-exempt organizations
- Political and lobbying activities



Grant Info

Grant Period: One year from date of signed contract

Payment Process: Upfront payments will be issued within 2-3 weeks of finalizing the grant agreement. Organizations will be asked to track their spending for reporting and potential audit purposes.

Reporting Requirements: A minimal mid-year report will be required around 6 months into the grant. A final narrative and financial report will be required within 30 days after the end of the grant period.



Grant Timeline




April 6, 2026	May 11, 2026	May 13- May 27, 2026	May 28, 2026	June 3, 2026	June 10, 2026	Late July 2026
SHIF Round 3 Application Opens	SHIF Round 3 Application Submission Deadline at 5pm	Community Oversight Board (COB), Application Review Period (approximate)	COB makes conditional award recommendations	Community Foundation's Board of Directors review and approve COB recommendations	SHIF Round 3 Awards announced to Grantees by 5pm	Contracts Signed and Funding Awarded



SHIF Scoring Rubric



Scoring Criteria	Possible Points
Section 1: Organizational Background	
Applicant meets eligibility criteria and demonstrates experience successfully executing projects and/or working with the proposed populations on housing development and/or housing security issues.	5
Section 2: Project Background	
Proposed project aligns with a Focus Area and addresses the need they identified	5
Proposed timeline for completion of proposed activities is achievable and/or aligns with grant performance period of 1 year.	5
Proposal clearly describes the impact proposed activities will have on addressing local housing needs and responding to housing insecurity.	10
Applicant demonstrates organization's ability to measure and track the outcomes of proposed activities.	5
Proposed metrics clearly describe how progress will be measured and what how the long and short term outcomes align with the selected Focus Area	5
Activities and proposed outcomes (long and short term) seem reasonable and applicants demonstrate how the work will move toward achieving them (including factors like partnerships, community support, and longevity of project)	5
Section 3: Project Budget Background	
Submitted project budget justifies each requested expense, aligns with the proposal scope and proposed timeline.	5
Applicant identifies potential leveraged sources of funding	5
Total Points	
50	
Priority Points	
2	
Priority points will be given to proposals submitted by eligible organizations that are BIPOC-led and/or have a majority (51%) BIPOC governing body. A total of two (2) additional points are available.	
Total Points + Bonus	
52	

“How to Apply” for a SHIF grant



“How to Apply”

Program Info – Request for Funding Proposal

<https://sanjoaquinconf.wpengine.com/where-we-focus/inclusive-economies/stockton-housing-innovation-fund/>

Grant Application Portal

www.sanjoaquinconf.org/grantsportal



Create Account



Step 1: Assess Eligibility	<ul style="list-style-type: none">• Review the eligibility criteria listed in the Stockton Housing Innovation Fund (SHIF) Application<ul style="list-style-type: none">◦ Questions about an Applicant’s eligibility may be sent to Amy Portello Nelson at anelson@sanjoaquinca.org
Step 2: Review the Application	<ul style="list-style-type: none">• Read the entire SHIF Application to understand submission details and requirements.
Step 3: Create a Grant Lifecycle Management (GLM) Account	<ul style="list-style-type: none">• Register for a free Grant Lifecycle Management Account by going to the following website: www.sanjoaquinca.org/grantsportal• 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 GLM	<ul style="list-style-type: none">• Follow these steps to access and submit the application:<ol style="list-style-type: none">1. Go to website: www.sanjoaquinca.org/grantsportal2. 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 the blue “Apply” button to begin the application process or return to draft application.• Answer all application questions in GLM.• 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 GLM by 5:00 pm PDT on Monday, May 11, 2026• After submission, GLM 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 GLM account.



Log In

1. Go to the website: <https://www.sanjoaquin.org/grantsportal>
2. Enter your Username (email address) and Password OR click on “Create New Account.”



The screenshot shows the login interface for the Grants Portal. At the top, there are logos for the San Joaquin Community Foundation and the Calaveras Community Foundation. Below the logos is a "Logon" section with two input fields: "Email Address*" containing "email@email.com" and "Password*" containing "*****". There are two buttons: "Log On" and "Create New Account". A link "Forgot your Password?" is located below the password field. To the right of the login form is a grey box with the following text:

Welcome to the Grants Portal! Use this portal to apply for grant opportunities, report, and find prior grant information for your organization.

New Users: If your organization has not registered, please click on "Create New Account" to complete the registration process and create your login credentials.

For help on registering, please click on the tutorial below:

- [Video Tutorial](#)

Existing Users: If your organization has already registered, please enter your credentials. If you forgot your password, please use the "Forgot your Password" link to the left to reset your password.

Not Sure? If you think that you or someone at your organization has already registered in the system, do not create a new account. Instead, please contact Alfonso Villalobos, Grants and Scholarships Associate, at avillalobos@sanjoaquin.org to receive your username.



Accessing the RFP

3. Once logged in, click the “Apply” button on the dashboard.

The screenshot displays a dashboard interface for 'ABC Company'. At the top left, there are logos for 'SAN JOAQUIN COMMUNITY FOUNDATION' and 'COMMUNITY FOUNDATION'. A navigation bar includes a home icon, a red-bordered 'APPLY' button, and a link to 'ORGANIZATION HISTORY'. The user profile 'TEST TEST2' is visible in the top right. The main content area is titled 'ABC Company' and features a search bar. Below the title, there are three sections: 'Action Needed (0)', 'No Action (0)', and 'Completed (0) | Historical (1)'. On the left side of the dashboard, there are two buttons: 'SEE OPPORTUNITIES' and 'ASSIGNED TO YOU (0)'. A 'UPCOMING (0)' button is also present. The bottom right corner contains a small logo with colorful figures.

Accessing the RFP pt. 2

4. The grant application will appear. Click the “Apply” button to access and apply for the grant opportunity.

The screenshot shows the ABC Company website interface. At the top left, there are logos for the San Joaquin Community Foundation and a home icon. Navigation links include 'APPLY' and 'ORGANIZATION HISTORY'. On the top right, there is a user profile icon labeled 'TEST TEST2'. The main content area is titled 'ABC Company' and features a search bar with the placeholder text 'Search or enter Access Code'. Below this, a card displays the 'Stockton Housing Innovation Fund 2026' grant opportunity. The card includes a 'PROGRAM OVERVIEW' section with text about the San Joaquin Community Foundation's invitation to submit proposals. At the bottom of the card, there is a 'See More' link, a 'Closes 05/11/2026' date indicator, and two buttons: 'Preview' and 'Apply'. The 'Apply' button is highlighted with a red rectangular border.



Completing the RFP

5. All questions with an asterisk * are required to be completed. All required questions must be completed before you can submit the application.

Name of Project*

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

6. You will be tasked with uploading a budget file. Click the “Upload a file” button to attach a file to the application. You may click the “Example Budget Template” document to download a budget template.

Budget Template File Upload*

Please provide a proposed budget for this project. For convenience and for your 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 applicable to the project. You may also upload your own existing budget template (be sure to include the budget information listed below.)

Example Budget Template

Budget Information: 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.

[Upload a file](#) [5 MiB allowed]

7. Once you have completed your application, click “Submit Application” at the bottom of the RFP OR click “Save Application” to save your progress and resume at a later time.

[Save Application](#)

[Submit Application](#)



Application Format

- 1. Organizational Background**
- 2. Project Background**
- 3. Project Budget Background**
- 4. Supporting Documents**

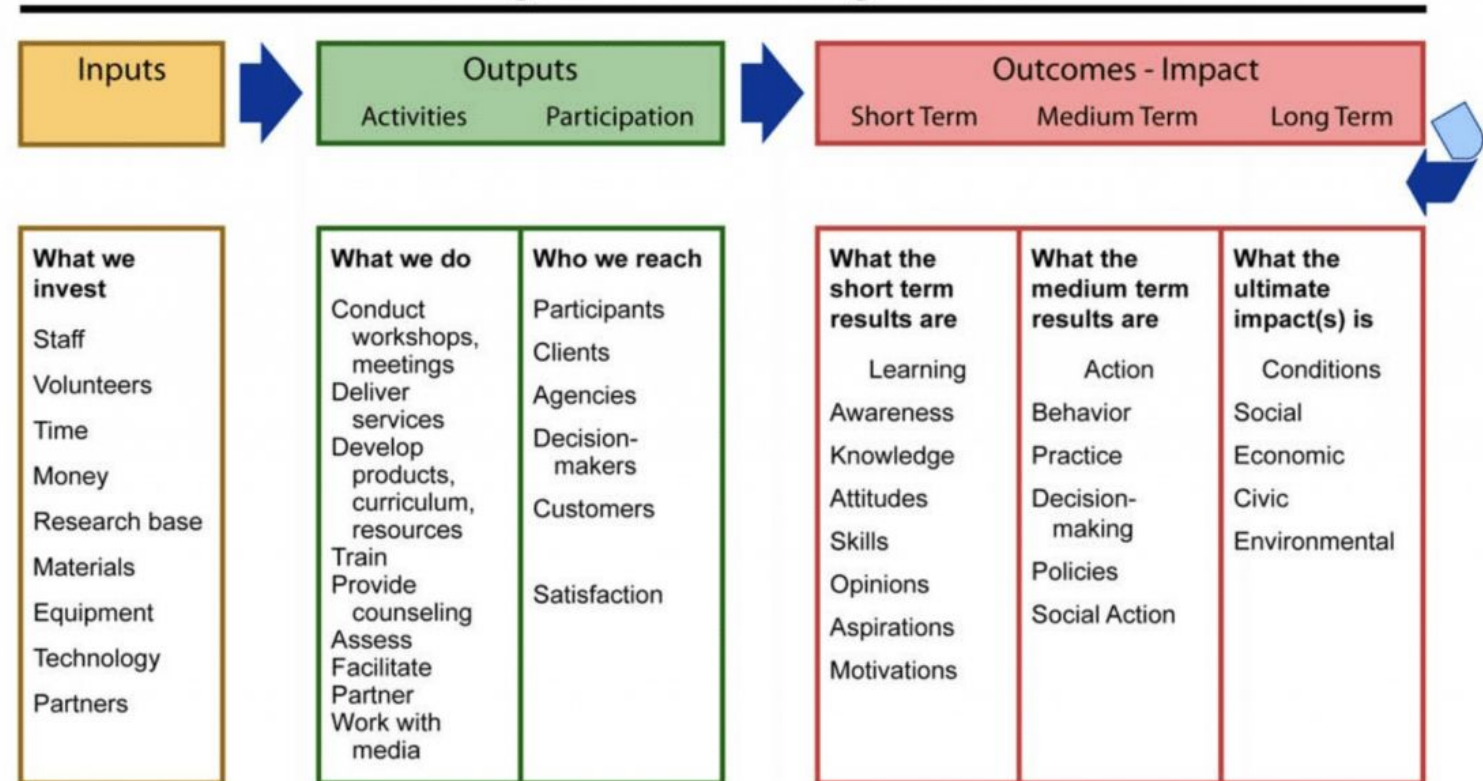


Logic Model

Logic Model

A logic model illustrates the association between your program's resources, activities, and intended outcomes. For the next few questions, please **outline the resources and activities available for your ENTIRE project** (not just what will be funded by this grant) and the **impacts and outcomes you aim to achieve, both within the grant period (outputs, number of individuals served) and throughout the duration of the project (short and long term outcomes).**

Program Action - Logic Model



Q+A

Questions related to the Request for Funding Proposal

Amy Portello Nelson at (209)943-2375 or anelson@sanjoaquinconf.org

Please include “*Stockton Housing Innovation Fund*” in the subject line.

Questions related to the application portal or other technical concerns

Alfonso Villalobos at (209) 943-2375 or avillalobos@sanjoaquinconf.org

Please include “*Stockton Housing Innovation Fund*” in the subject line.



All webinar materials will be posted on the SHIF website to review.

If interested, an optional “Grantwriting 101” webinar will be offered Fri. April 10 at 10am.

A recording of this will be posted to the SHIF website on Mon. Apr 13.



Q + A





**Thank
You**

sanjoaquincf.org

