

# NHS Research and Planning Fund

APPLICANT GUIDE  
2020



*Photos taken prior to COVID-19  
physical distancing safety measures*

This guide is for organizations interested in applying to one of the four streams of the Research and Planning Fund.

Additional information can be found in the resources section of the Research and Planning Fund website:

**[cmhc-schl.gc.ca/en/nhs/research-and-planning-fund](https://cmhc-schl.gc.ca/en/nhs/research-and-planning-fund)**

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## SECTION 1 – GENERAL INFORMATION

### 1.1 Overview of Section 1

The purpose of this section is to provide general information about Canada Mortgage and Housing Corporation's (CMHC) *NHS Research and Planning Fund*.

### 1.2 NHS Research and Planning Fund Introduction

*The NHS Research and Planning Fund* provides support to not-for-profit organizations, registered charities, and Indigenous governments and Indigenous organizations undertaking housing research.

The overarching objective of the program is to build collaboration, engagement and alignment with stakeholders to achieve common research goals and to support the housing community's research capacity development.

Drawing from national consultations that were launched in the summer of 2016 to solicit the views of individual Canadians, housing organizations, experts and stakeholders, information was collected that helped identify the most important housing challenges where research could help provide answers.

Relevant information can be found in the analysis of consultations entitled *What We Heard: Shaping Canada's National Housing Strategy*.

### 1.3 Canada Mortgage and Housing Corporation Background

CMHC is the Government of Canada's National Housing Agency, with a mandate to help Canadians meet their housing needs. As Canada's authority on housing, we contribute to the stability of the housing market and financial system, provide support for Canadians in housing need, and offer objective housing research and advice to Canadian governments, consumers and the housing industry.

CMHC is a Crown Corporation, with a Board of Directors, reporting to Parliament through the Minister of Families, Children and Social Development, and Minister responsible for Canada Mortgage and Housing Corporation, the Honourable Ahmed Hussen.

### 1.4 National Housing Strategy (NHS) Overview

Affordable housing is a cornerstone of inclusive communities. It helps to strengthen the middle class and grow the Economy. Canada's first ever National Housing Strategy is a 10-year, \$55+ billion plan that will give more Canadians a place to call home and will create a new generation of housing in Canada. Through the National Housing Strategy, the federal government is re-engaging in affordable housing and bringing together the public, private and non-profit sectors to ensure more Canadians have a place to call home. The goal of this historic strategy is to make sure Canadians across the country can access housing that meets their needs and that they can afford. To achieve this goal, the strategy will first focus on the most vulnerable Canadians.

The NHS will create livable communities where families thrive, children learn and grow, and their parents have the stability and opportunities they need to succeed. It will spearhead innovative new housing research, data and demonstration projects to fill gaps in our knowledge, share the best

ideas and shape the future of housing policy in Canada. It also creates new opportunities for the federal government to innovate through partnerships with the community housing sector, co-operative movement, private sector, and research community.

For more information on the National Housing Strategy, visit [placetocallhome.ca](https://placetocallhome.ca)

## 1.5 Research And Planning Fund Overview and Eligibility

Under the National Housing Strategy, this stakeholder-focused funding opportunity helps to promote interest and involvement in housing research outside of government, supports data development and cultivate and supports highly focused expertise to rapidly overcome challenges and develops solutions to improving affordable housing and communities across Canada. Please note that this year's call for proposals will take a different approach, targeting populations that have been under-represented in the previous calls for proposals. We will prioritize projects that examine the particular context and challenges of racialized persons or communities, survivors fleeing situations of family violence, LGBTQ2, indigenous peoples, Veterans and those experiencing mental health challenges.

We will additionally be changing the format for the application and review to a two-step approach. Please see section 2.1 for details on these changes. During Stage One, applicants will discuss the gap the project would address, relevance to the NHS objectives, and expected outcomes and potential for impact. After a review process, CMHC will invite a subset of applicants meeting our eligibility and score cut-offs to submit additional information with their proposal, without duplicating information provided for Stage One. Stage Two information will include addressing partnerships, methodology and knowledge transfer plan. This Fund provides financial support in four different streams (see Section 3 of this guide for definitions and eligible activities for each stream):

- Funding support for **individual research projects** (Requests of up to \$100,000);
- Funding support for a **program of research** (Requests of up to \$250,000);
- Funding support for **planning activities** with a focus on research (Requests of up to \$50,000); and
- Funding support for **knowledge mobilization projects** (Requests of up to \$50,000).

Stream	Description	Eligible Activities*
<b>Individual Research Project</b>	A systematic, planned process that involves identifying key questions and developing new methods or using established methods (e.g., surveys, focus groups, interviews, literature review, measurements, evaluations, analytics, processes) to gather and analyze information to answer these questions. Research projects are undertaken to create new knowledge (or synthesize existing knowledge in new ways to create new information and understanding) to deepen understanding, inform recommendations or draw conclusions on a specific topic or issue.	<ul style="list-style-type: none"> <li>• Projects can include a range of research activities such as literature reviews, environmental scans (domestic and international), surveys, interviews, testing, evaluations, data gathering and analysis, profiles, case studies, and reporting findings.</li> <li>• Funding can also be used to support hiring of consultants to conduct this work.</li> </ul>
<b>Program of Research</b>	A sustained research enterprise that includes more than one well-coordinated, and connected research projects conducted in parallel or successively, to collectively advance knowledge in a particular topic or theme area. In pursuit of the overall objectives, the individual research project components can be iterative or conducted in parallel and use a variety of methodologies. Programs of research are shaped by broad objectives and seek to leverage the findings from multiple research projects to more completely assess and advance knowledge. Programs of research may be led primarily by one investigator or by a team of researchers.	
<b>Planning Activity</b>	An activity (or set of activities) conducted for the purposes of more clearly defining problems, issues and opportunities, exploring approaches, methodologies, preparing and building capacity, and, identifying resources for a future research project. Planning activities involve engaging individuals with subject matter expertise, examining emerging issues and priorities for the purpose of identifying research questions, and developing a potential research project plan/research proposal.	<ul style="list-style-type: none"> <li>• Stakeholder consultations, including citizen engagement activities.</li> <li>• Environmental scan or preliminary synthesis of relevant literature, activities or programs.</li> <li>• Gatherings of stakeholders to facilitate regional/national and/or international collaboration among individuals or groups from a variety of backgrounds.</li> <li>• Hiring consultants to prepare research applications for groups that don't have the capacity to do so on their own.</li> </ul>

Stream	Description	Eligible Activities*
<p><b>Knowledge Mobilization Project</b></p>	<p>A project undertaken to communicate research results and help translate research findings recently completed or soon-to-be completed into action. These projects involve a planned approach for sharing information using relevant knowledge mobilization strategies (e.g., workshops, forums, webinars, toolkits, presentations) to meet identified learning needs of one or more target audiences. Knowledge mobilization projects showcase research findings related to features, approaches, programs, policies, practices or technologies that are best-in-class, innovative, leading-edge, replicable and scalable, and relate to the planning, design, construction, operation, administration, management, renewal and delivery of affordable housing (and affiliated supportive services).</p>	<ul style="list-style-type: none"> <li>• Designing, developing and delivering of knowledge mobilization strategies such as brochures, posters, background research, engagement and facilitation activities, material development, summary reporting, educational seminars, presentations, mock-ups and models, on-line forums, and information sharing platforms.</li> </ul>

\* This list of eligible activities is not exhaustive nor comprehensive; the applicant may propose other activities for eligibility. However, in doing so, the applicant must clearly identify in the application that the proposed activity is consistent with the NHS Priority Areas and NHS Priority Population Groups and contributes to building collaboration, engagement and alignment with stakeholders to achieve common research goals or supports the housing community's research capacity development.

The fund has an annual budget allocation of \$750,000 to cover all streams of activity. The amount of funds available for new projects each year varies due to the multi-year nature of some projects and delays in project timelessness, such as those caused by COVID.

CMHC is seeking applications to support planning and research activities that address NHS priority themes and populations, aim to build collaboration, engagement and alignment or supports the housing community's research capacity development. This year, CMHC will prioritize funding eligible projects addressing priority areas for which we have received fewer proposals in previous calls, including racialized persons or communities, survivors fleeing situations of family violence, LGBTQ2, indigenous peoples, Veterans, and those experiencing mental health challenges.

The NHS Priority Areas are:

1. Housing for those in Greatest Need (including the following NHS Priority Population Groups):
  - a. Survivors fleeing situations of family violence
  - b. Seniors
  - c. Persons with disabilities
  - d. Individuals with mental health and addiction issues
  - e. Racialized persons or communities
  - f. Newcomers and refugees
  - g. Individuals identifying as LGBTQ2
  - h. Veterans
  - i. Indigenous peoples
  - j. Young Adults
  - k. Individuals experiencing homelessness



2. Social Housing Sustainability;
3. Indigenous Housing;
4. Northern Housing;
5. Sustainable Housing and Communities; and
6. Balanced Supply of Housing.

***Who Can Apply?***

CMHC is seeking applications from not-for-profit organizations, registered charities and Indigenous governments and Indigenous organizations undertaking housing research. Note that the proposed project team can include members beyond these organizations. Lead applicants are encouraged to engage with collaborators in other sectors (e.g., academia, private sector, municipal governments or regional governments – including municipal or regional housing providers).

## SECTION 2 – APPLICATION AND SUBMISSION INSTRUCTIONS

The purpose this section is to provide potential applicants with information about CMHC's procedures and rules pertaining to the application process.

This section provides information, for the benefit of applicants prior to submission of their applications, to assist the applicant in ensuring that their application response is complete and includes all the mandatory requirements (as indicated below).

Non-compliance with a mandatory requirement will eliminate the application from further consideration.

### 2.1 Application Intake Process

A call out for Stage One applications will launch October 2020.

This year, we will use a two-stage selection process. In Stage One, applicants will submit the lead applicant's background information, the Project Summary, Project Objectives and Outcomes, and Project Relevance, as well as an estimated project cost. CMHC will review Stage One proposals and invite qualified proponents to submit additional information in Stage Two, where CMHC will ask for a detailed budget, the Statement of Work, and the Knowledge and Dissemination Plan. By submitting an application, applicants agree to be bound by the terms of this Applicant Guide, and the terms and conditions presented in the online application portal.

### 2.2 Submission Instructions and Deadline (Mandatory)

#### 2.2.1 Language of Application

Applications may be submitted electronically in English or French.

#### 2.2.2 Delivery Instructions and Deadline

The NHS Research and Planning Fund application forms and the intake portal for submitting the application (including all supporting documentation) can be accessed at [cmhc-schl.gc.ca/en/nhs/research-and-planning-fund](https://cmhc-schl.gc.ca/en/nhs/research-and-planning-fund)

**The deadline to apply is 2:00 p.m. (in the respective time zone of the lead applicant organization) on November 27, 2020 for Stage One and March 15, 2021 for those applicants invited to submit a Stage Two Application.** The time of delivery for the purposes of this section is deemed to be the time recorded by the CMHC system receiving the application, and not the time the application was sent by the applicant.

Submission of supplementary documentation (e.g. Curriculum Vitae, Partnership Letters (financial contribution) etc.) must be submitted along with the application through the same application intake portal.

Upon receipt of applications, an automated confirmation will be issued from CMHC to the sender's e-mail address. It is strongly recommended that applicants follow up with the contact identified in Section 2.2.4 if they have not received a confirmation within 30 minutes of submission.

### 2.2.3 Application Opening, Verification Period, and Deadlines

Applications arriving after the submission deadline for Stage 1 or Stage 2 respectively will be automatically rejected, and the lead applicant will be so notified by e-mail.

In the event that access to the platform for submitting cannot be done, in remote regions for example, it will be possible to send proposed project applications, including all supporting documentation by mail or courier. However, in such cases, the responsibility will be on the lead applicant to allow sufficient time from the mail drop-off or courier pick-up to ensure the application is **received** by CMHC in advance of the deadline date and time, as outlined in Section 2.2.2 above.

The provision to send applications in the mail is considered exceptional and is permitted only in situations where it is not possible to use the web portal platform, such as a case involving remote regions, and therefore applicants **must** consult with CMHC before submitting an application by mail.

Timely and correct submissions of applications in the exact specified delivery platform is the sole responsibility of the applicant. All risks and consequences of a failure to submit an application to CMHC are borne by the applicant. CMHC will not assume those risks or responsibilities under any circumstances.

All confirmations of decisions by CMHC regarding received applications will be provided to lead applicants in writing.

### 2.2.4 Enquiries

All questions must be directed to the following contact person:

**CMHC Research Manager**

**[RPF-FRP@cmhc-schl.gc.ca](mailto:RPF-FRP@cmhc-schl.gc.ca)**

Phone: 1-800-668-2642 (8 a.m. to 7 p.m. ET)

CMHC cannot guarantee a response to enquiries received less than seven (7) business days prior to the application deadline.

### 2.2.5 Applicant Contact

The applicant identified in Section 1 of the NHS Research and Planning Fund application form, including name and contact information is considered to be the primary contact for CMHC during the evaluation period. During application evaluations, CMHC reserves the right to contact any individual applicant in order to obtain clarification of its submission. Any such communication is limited to clarification purposes only, and applicants will not be allowed to revise their application during this process.

### 2.2.6 Offering Period (Mandatory)

The terms of the application shall remain valid for a period not to exceed one hundred and twenty (120) days following the application deadline.

### 2.2.7 Changes to Application

It is strongly suggested that the applicant take time to review their application prior to submission to minimize the need to make changes. If changes to an application that has been submitted through the portal are required, applicants must make arrangements with a CMHC representative through the inquiry channel indicated in Section 2.2.5.

Changes must be received as an addendum to, or clarification of, a previously submitted application, or as a new application that replaces and supersedes the application that was previously submitted. Any additions or revisions must be accompanied by a clear statement indicating what part of the application the change or addition is meant to address. Where possible, a new application is preferred to avoid confusion. Any changes or additions to a previously submitted application, or the submission a new application, must be received no later than the submission deadline.

### **2.2.8 No Liability**

While CMHC has made considerable efforts to ensure that the information in this application form is accurate and complete, it is possible that errors may exist. The information is not guaranteed or warranted to be accurate by CMHC, nor is it necessarily comprehensive or exhaustive. CMHC will have no liability of any kind to applicants for losses or damages arising from any errors that may be found in the application, regardless of how the errors are caused. Applicants remain obliged to make their own investigation of relevant information and to form their own opinions and conclusions in respect of the matters addressed in this application.

By submitting an application, applicants waive any claim or cause of action that they may have against CMHC or its representatives as a result of the conduct of this application process or any resulting Contribution Agreement, except insofar as they have proof of willful misconduct on the part of CMHC or its representatives. Applicants agree that they will not bring a court action or institute any other proceedings against CMHC for damages arising from the conduct of this application or any resulting Contribution Agreement. This section is intended to be a complete waiver of the applicant's right to claim damages subject to the limited exception noted above.

### **2.2.9 Verification of Application**

CMHC reserves the right to conduct such investigation as it deems appropriate to verify the contents of the application.

### **2.2.10 Corporation Identification**

Applicants agree that they will not make any use whatsoever of CMHC's name, logo or other official marks without the express written consent of CMHC.

### **2.2.11 Conflict of Interest**

The lead applicant organization and its principals, employees and agents shall avoid any real, potential or apparent conflict of interest during the application intake process, and upon becoming aware of a real, potential or apparent conflict, shall immediately declare the conflict to CMHC. The applicant shall then, upon direction of CMHC, take steps to eliminate the conflict, potential conflict or perception that a conflict of interest exists.

The successful applicant must not provide any services to any third-party in circumstances that might reasonably give rise to a conflict of interest between the applicant's duties to that third-party and the applicant's duties to CMHC.

In the event that a conflict of interest, real, potential or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately eliminate the applicant from consideration or to terminate the resulting Contribution Agreement. Upon such elimination or termination, CMHC shall have no obligation of any nature or kind to the applicant.

### **2.2.12 CMHC's Obligations**

By issuing this call for applications and accepting applications, CMHC assumes the obligation of conducting the application evaluation and selection process in a fair and transparent manner. CMHC has no obligation to compensate any applicant for work done for the purposes of this application.

Timely and correct submission of the application in the specified delivery platform before the submission deadline is the sole responsibility of the applicant. All risks and consequences of a failure to submit a complete application on time to CMHC are borne by the applicant. CMHC will not assume those risks or responsibilities under any circumstances.

In addition, in the event that CMHC or the application review committee determine that no application merits the award of any funding in any given year, it will not be awarded.

### **2.2.13 Contribution Agreement**

The applicant and CMHC shall enter into a contribution agreement that will set out the terms and conditions of any funding awarded through the NHS Research and Planning Fund.

### **2.2.14 Indemnification and Insurance Requirements**

In submitting an NHS Research and Planning fund application, the applicant understands and acknowledges that should the project be accepted, the applicant shall, at its own expense, procure and maintain or cause to be procured and maintained insurance coverage which is commercially reasonable and customary for businesses of similar industry practices which shall be in force for the duration of the project. CMHC reserves the right, in its sole and absolute discretion, to conduct Insurance Requirement negotiations with the applicant. Depending on the level of risk exposure of the project, various insurance coverage and insurance limits may be required and/or adjusted accordingly.

The applicant also acknowledges and accepts that should the project be accepted, any subsequent contribution agreement with CMHC will include clauses stipulating the applicant will indemnify and save harmless CMHC and its directors, officers, employees and agents.

### **2.2.15 Research Ethics**

Should the project be accepted, the applicant is responsible for ensuring that all research activities that involve collecting information from participants (through surveys, interviews, etc.) adhere to the principles of respect for persons, concern for welfare, and justice. Applicants are responsible for ensuring that funded projects incorporate protocols related to informed consent, privacy, and confidentiality as described in the Tri-Council Policy Statement. [https://ethics.gc.ca/eng/policy-politique\\_tcps2-eptc2\\_2018.html](https://ethics.gc.ca/eng/policy-politique_tcps2-eptc2_2018.html)

## SECTION 3 – APPLICANTS’ GUIDE – PREPARING AN APPLICATION

### Where to Apply

The NHS Research and Planning Fund involves an on-line application intake process. See Section 2.2.2 and Section 2.2.3 of this guide for information on obtaining an application form and the online application portal for submitting an application.

The application form must be submitted in accordance with the conditions and requirements as set out below and as stated in the delivery instructions in Section 2.2.3 in order to be considered for evaluation by CMHC.

In the event that it is not possible to submit the application through an on-line application intake process (e.g. sending from a remote location without internet access); or an application is required in an alternate format, applicants must reach out to CMHC (see 2.2.4) at least twenty (20) business days before the application deadline to see whether an alternative arrangement can be accommodated.

### Stage One - Application Form

#### Section A: General Information

General information regarding the proposed project, including the identification and contact information of the applicant, as well as the key personnel representing team is required in Section A. The applicant is the organization that receives the funding and will be expected to enter into a contribution agreement to be negotiated with CMHC which will outline the schedule of payment and deliverables.

##### ***A.1 Applicant Contact Information***

The lead applicant must provide contact information for an individual at their organization who will be the single point of contact for the application.

##### ***A.2 Organization Address***

The applicant must provide their address.

##### ***A.3 Project Stream***

Applications are accepted in four distinct project streams:

- Individual research projects;
- Program of research;
- Planning activities; and
- Knowledge mobilization projects.

Applicants should select one project stream to which to submit their application. Section 1 of this application guide provides detail on each of the streams and the activities considered eligible under each stream.

**Note:** Organizations are limited to submitting one application to the Research and Planning Fund per competition cycle.

### ***A.4 Focus of Project***

Please indicate whether your proposal focuses primarily on technical or socio/economic aspects of affordable housing. This information is collected for administrative purposes and to help facilitate the review process.

**Technical** aspects of affordable housing include (but are not necessarily limited to) planning, design, construction, commissioning, operations and maintenance, repairs and renewal, performance monitoring, measurement and verification, innovative construction processes, materials, equipment and systems, energy efficiency and conservation, indoor air quality and comfort, water efficiency, resource consumption and conservation, environmental impact, community design, community energy systems, resiliency, and durability.

**Social/economic** aspects include (but are not necessarily limited to) specific housing needs and conditions of NHS priority populations, strategies to address these needs, affordable housing financing, social inclusion, housing affordability, tenure options, homelessness, culturally and lifestyle appropriate housing, affordable housing sector transformation, viability and sustainability.

### ***A.5 Other Funding Requests***

Projects applying for funding or receiving funding from other institutions, organizations, programs, etc., are eligible to apply for funding through the NHS Research and Planning Fund; stacking and leveraging of funds to undertake projects is permitted. However, this section of the Application Form is intended to highlight whether the proposed project is subject to and contingent upon any (pre-) existing funding arrangements or funding requests that may impact the feasibility or viability of the proposed project proceeding, whether or not the granting of funds from the NHS Research and Planning Fund is successful.

## **Section B: Eligibility Criteria**

### ***Lead Applicant Eligibility***

- Lead applicant must be an active not-for-profit, charitable, or Indigenous government or Indigenous organization in Canada.

Note: partners and team members are not limited to these organizations; lead applicants are encouraged to engage with collaborators in other sectors (e.g., academia, private sector, municipal government).

### ***Project Eligibility***

- Project must address one or more NHS Priority Areas and NHS Priority Population Groups. This year, CMHC is prioritizing funding to a the following priority groups for which we have received fewer proposals in the past: racialized persons or communities, survivors fleeing situations of family violence, LGBTQ2, indigenous persons, Veterans, and those experiencing mental health challenges.
- At time of application, partner contributions totalling 25% of the total project cost must be confirmed. Letters from contributing project partners must be included with the application.
- The project must not have been funded through the Research and Planning Fund in a previous competition year. Support will not be given to one applicant in two sequential years for the same project, event, or identical activity.
- Funding will only be provided for research projects or activities that will occur after the submission deadline.

## Section C: Project Overview

### ***C.1 Project Title***

The applicant shall provide a Project Title. The title should reflect the nature of the project (i.e. what the project is designed to address/achieve).

### ***C.2 Project Period***

The applicant must clearly identify the project "Start Date" and "End Date". Research projects, planning activities, and knowledge mobilization projects are expected to be delivered and completed within 12 months from the signing of the contribution agreement. In cases of a program of research, larger or more complex projects, or other circumstances detailed by the applicant, consideration may be given to projects lasting longer than 12 months.

### ***C.3 Total Project Cost***

In this section, the applicant must state the total cost the proposed project. This includes the funding requested from CMHC and in-kind or cash contributions from project partners. This amount should be inclusive of taxes.

### ***C.4 Total Partner Contributions***

Applicants are required to demonstrate a 25% contribution of the total project cost (section C.3) to the proposed research project, which may be provided in the form of "cash" or "In-Kind" amounts, defined as described below. Where partners are contributing to the 25% requirement, please see section C.6 on partnership details.

Cash contribution refers to the provision of actual dollars (currency) used to off-set and pay for project expenses incurred during the design, delivery and implementation of the project.

For eligible project activities see Section 1 of this Applicant Guide (General Information). Expenses related to the carrying out of research and planning projects may include:

- travel and hospitality (food and accommodation) expenses. (Please note: All travel costs must reflect the most economic means available for transportation, accommodation and facilities. Compensation rates for vehicle use, meals, etc. must comply with applicant organization's standards, but cannot exceed federal government rates.)
- disability accommodation costs (e.g. accessible transportation, interpreters, note takers).

Funding cannot be used to replace existing salaries or for ongoing salary support. Ineligible expenses include tuition or related fees; and, equipment or services (e.g. laptop, books).

**In-Kind Contribution** refers to the dollar-value of labour, services and resources team members contribute towards the design, delivery, information dissemination, and reporting aspects of the project/activity, or specific activities within the overall project, in lieu of cash or in lieu of services necessary to the design, delivery and implementation. A breakdown of all In-kind contributions (staff time, labour rates, expenses, etc.) together with the associated activity, will be required for the review and consideration by the evaluation committee.



The types of in-kind contributions that are recognized and considered eligible are:

- equipment
- access to unique databases/software
- professional, analytical, or other services
- employee salaries (i.e. the salary of an employee not listed on the application form)
- use of facilities
- materials and technology
- licenses

### ***C.5 Total Funding Requested from the Research and Planning Fund***

The total amount of funding requested from CMHC shall be clearly stated and inclusive of taxes. This amount should not be greater than 75% of the total project cost presented in section C.3.

### ***C.6 Partner Organizations***

In this section, the applicant should list each partner organization (including the organization of the lead applicant) that has confirmed cash or in-kind contributions to the project. A signed letter from each partner organization must be provided at the time of application. The letter must include the specific cash or in-kind contributions being provided by the partner organization in support of the proposed research or planning activity.

For the purposes of the Planning and Research Fund, a partner is an organization that is bringing a cash or in-kind contribution to the project. It is possible for your project team to include members who do not represent partner organizations, and thus do not bring cash or in-kind contributions. There are no limits on the size of the project team. There are no restrictions with respect to joint ventures, partnerships with third-parties; in fact, partnership arrangements are encouraged.

All applications must be accompanied by a letter from each partner (maximum two pages each, in PDF format) providing details on the nature and the objectives of the partnership, and the contribution type and amounts (cash or in kind). The letter must be addressed to the lead applicant and dated and signed by the partner organization on letterhead.

As part of its due diligence process, CMHC may contact potential partner organizations.

## **Section D: Project Details**

In this section, the applicant is to provide detailed information regarding the nature and extent of the proposed project and the roles and contributions of the key players in the design, delivery and implementation of the project.

### ***Section D.1: Project Summary/Description (550 Words)***

Provide an overview of the issue, research questions, what will be done in the project in the space provide. Consider the following:

- What question/gap issue is the project trying to address?
- Why is it important?

### **Section D.2: Objectives and Outcomes (250 Words)**

The applicant must provide a brief and succinct statement explaining the objectives (purpose) of the project or activity and the expected impact and outcomes.

Consider the following:

- What is the expected impact of the project?
- Do the objectives align with the project's expected outcomes?

### **Section D.3: Project Relevance (500 Words)**

Please explain how the project aligns to the NHS Priority Areas, including the project's relevance to the NHS Priority Vulnerable Groups. It is recommended that the applicant review Appendix 1, the NHS website ([placetocallhome.ca](http://placetocallhome.ca)), and relevant background documents in order to demonstrate that the project aligns with the NHS Priority Areas. Provide brief description of the scope, depth, pervasiveness, and complexity of the issue or problem to be solved.

Applicants should consider the following (as applicable):

- How will the project address the distinct needs of low-income and vulnerable Canadians; the vitality of the social housing sector; housing for Indigenous people, including the North (if applicable); and any innovative strategies that increase affordability?
- Will the project will contribute to the development of sustainable housing and other social, economic and environmental goals?
- Will the project improve housing conditions for Canadians, particularly those in greatest need?
- How will the project substantively impact the outcomes for NHS priority populations?
- Does the project address a gap in the housing system?

## **Section E: Organization Descriptions**

Please include an organization description for each project collaboration and partner.

## **Section F: Application Checklist**

Please ensure your application includes all the following components. Incomplete applications will not be considered.

### **Stage One Checklist**

Stage One Application Form

Organization Description(s)

Please do not include any additional material as it will not be assessed by the adjudication panel.

## Stage Two - Application Form

### Section A: General Information

Please confirm the lead organization's contact information.

### Section B: Project Overview

For Sections B.1-B.5, please confirm or update the title, cost, partner contributions, funding request, and partner organizations as needed from your Stage One application.

#### ***B.6 Project Team Details***

One applicant must apply on behalf of the team as the lead applicant to have one point of contact. Lead applicant contact information is provided in Section A of the application form. The application package must also include a brief organization description (if applicable) and a CV for each team member. If successful, funding will be provided to the lead applicant organization and this organization will disburse the funds as appropriate.

CMHC encourages applicants to build project teams that reflect the diversity of the community or vulnerable populations they are focused on or that are intended to be served by their project.

In this section, the applicant must clearly identify how team members reflect this diversity, and clearly articulate the key roles and contributions of each key team member and how these contributions add value to the project.

Applicants should address the following items in completing this section of the application:

- How well do the proposed team members align with the objectives (i.e. are they a good fit)?
- To what degree will the composition of the team reflect the population/topic being researched, enhance outcomes, bring value to the project, and increase the probability of success?
- What are the unique strengths and skills that each of the team members bring to the project?
- Does the composition of the team strengthen leveraged outcomes through collaboration?

#### ***B.7 Indigenous Nations Consultation***

If the proposed project occurs within or adjacent to First Nations, Inuit or Métis government(s) or community's territories, or if these governments/communities may be impacted by your project, consultation may be required. The applicant must identify which Indigenous nations would be impacted by the proposed project, the engagement process to be used, confirmation of ethics guidelines to be followed, and provision of Indigenous representation as part of the project team.

### Section C: Project Details

#### ***C.1: Budget***

If the application is selected for funding, the lead applicant organization will receive the funding and will be expected to enter into a contribution agreement to be negotiated with CMHC which will outline the schedule of payment and deliverables.

In preparing the application, the applicant should provide a budget (uploaded as a separate document). The budget should include be broken down by fiscal year (April 1 – March 31), project phases (if applicable) and key deliverables. It should describe all costs associated with the proposed

project activities and all proposed sources of revenue (e.g., funds requested through the Research and Planning Fund, in-kind contributions) for these activities. The budget must be inclusive of taxes if applicable.

### ***Section C.2: Statement of Work/Methodology/Project Management (1500-2000 Words)***

This section is, effectively, the presentation of the “Statement of Work” which provides a detailed breakdown of all the relevant and key activities, tasks, milestones involved in the design, delivery and implementation of the project/activity. Where possible, estimate the potential benefits of the project/activity. Indicate the unique tools, processes, opportunities, and expertise that the project team aims to generate through the proposed project to achieve these benefits.

The following bullets are examples of questions to be considered in the preparation of the project details:

- What will the research project or the activity showcase?
- How will the project be carried out, why, and by whom?
- What are the different phases, milestones, tasks, activities, and any stage gates or dependencies including proposed start-end timelines?
- What are the anticipated results?
- What technologies, policies, programs, etc. (if any) will be created?
- What performance monitoring activities will be undertaken and how will outcomes be reported to CMHC?
- How will the immediate impact and longer-term success be measured and how it will contribute to NHS priorities, government objectives, sector objectives?

### ***Key Considerations***

1. Is the description sufficiently detailed with key start/end dates and an expected project timeline?
2. Is the project description well-constructed, clearly describing the design, delivery and implementation of project elements?
3. Are the dependencies, partnerships and relationships appropriate with respect to the delivery and implementation of the project?
4. Is the project description coherently written, well-organized and comprehensive (i.e. no information gaps)?
5. Does the project incorporate a Gender-based Analysis Plus (GBA+) or other intersectional approach that is appropriate for the priority population selected? How will this approach inform each component of the work?
6. Does the project incorporate appropriate ethical considerations including privacy and confidentiality?

### **Section D: Knowledge and Dissemination Plan (As Applicable)**

The overarching objective of the Research and Planning Fund is to build collaboration, engagement and alignment with stakeholders to achieve common research goals and to support the housing community’s research capacity development. In addition to building collaboration and capacity, the sharing and uptake of information, knowledge and lessons learned from funded projects is expected.

The applicant should outline the proposed approach for promoting and celebrating the impact and outcomes of the project. Elements of a strong promotion strategy include: purpose, size and makeup of the target audience, objectives, key messages, promotional activities, knowledge products used (case study, best practices, research reports, etc.), and an evaluation plan (how the effectiveness of each activity will be measured).

For applications that are solely a knowledge mobilization activity, this section does not need to be completed. Details of the approach and strategy should be described in the Application Form Section D.5 Statement of Work/Methodology/Project Management.

## **Section E: Curriculum Vitae and Organization Descriptions**

Applicants submitting proposals to the research project, program of research, and knowledge mobilization project streams must upload a CV for key members of the project team. CVs are not required for applications to the Planning Activity stream. CVs should be a maximum of 2 pages in PDF format and include the following information:

- Education and skills
- Experience
- Relevant distinctions and awards received

Please include an organization description for each project collaboration and partner.

## **Section F: Application Checklist**

**Stage Two Checklist** (if invited to apply by CMHC)

Stage Two Application form (with additional components)

Additional Partner Organization Descriptions (if not included in Stage One)

CV(s)

Partner Support Letter(s)

Budget table

Please do not include any additional material as it will not be assessed by the adjudication panel.

## SECTION 4 – SELECTION PROCESS

### 4.1 Overview of Section 4

The purpose of Section 4 is to inform the applicant about the selection process once the application has been received.

### 4.2 Selection Process

Reviewers will score applications based on the Evaluation Criteria listed in Section 4.3. Proposals must reach 80% for each criteria to be considered successful. CMHC may engage external reviewers to assist in scoring proposals.

**Stage One Process:** Reviewers will score applications for criteria 1: concept and relevance listed in Section 4.3. Proposals must reach 80% to be considered for stage 2. CMHC reserves the right to request Stage Two proposals only from those applicants who select one of the targeted priority groups for this year's call. (See Section 1.5).

**Stage One Timeline:** CMHC anticipates inviting successful applicants to submit additional information for Stage 2 in January 2021.

**Stage Two Process:** For Stage Two, reviewers will score applications against criteria 2, 3, and 4 in Section 4.3. Those evaluation criteria considered in Stage One will not be re-evaluated a second time. Proposals will be selected based on combined scores from both application stages, with funding eligibility only for those proposals receiving 80% or above in every category. It is possible that there will be insufficient funding to fund every eligible proposals. In that case, CMHC will prioritize proposals to ensure the targeted priority populations for this year's call are adequately addressed (see Section 1.5).

**Stage Two Timeline:** CMHC anticipates notifying successful applications no later than May 2021.

### 4.3 Evaluation Criteria

For all streams, only applications scoring 80% or higher in each of the criteria according to the evaluation matrixes outlined below will be eligible for funding:

#### ***Research Projects/Program of Research***

1. Concept and relevance of the project to the NHS priority themes and populations: (25%)
2. Methodology and project management, including the extent to which applicants have described using a GBA+ or other intersectional lens: (25%)
3. Knowledge exchange and/or dissemination plan: (25%)
4. Feasibility: (25%)

#### ***Planning Activities***

1. Relevance to NHS priority themes and populations: (35%)
2. Activity objectives and format: (35%)
3. Knowledge exchange and/or dissemination: (15%)
4. Feasibility: (15%)

***Knowledge Mobilization Projects***

1. Relevance to NHS priority themes and populations: 25%
2. Knowledge mobilization objectives: 25%
3. Suitability of knowledge mobilization product (s), channel (s) and audiences (s): 25%
4. Potential for impact: 25%

Entries are weighed individually, not against one another. Failure to provide sufficient evidence to demonstrate all selection criteria will weaken your application.

# APPENDIX 1 – NATIONAL HOUSING STRATEGY PRIORITY AREAS

## Priority Areas

### Housing for those in Greatest Need

- Improve housing and supports for the most vulnerable, including those who are homeless and those with distinct needs
- Improve affordability of housing for low-income households

### Social Housing Sustainability

- Improve sustainability of social housing and build capacity

### Indigenous Housing

- Improve housing conditions among First Nations, Métis and Inuit households
- Increase Indigenous autonomy and capacity for housing

### Northern Housing

- Improve housing conditions in Canada's territories

### Sustainable Housing and Communities

- Improve building performance, durability and energy efficiency of housing
- Increase housing options near transportation and transit, work, supports and services, as part of mixed income, age-friendly, accessible communities

### Balanced Supply of Housing

- Increase Canada's supply of rental housing
- Preserve and renew existing rental housing
- Meet evolving home ownership needs of Canadians

Please go to [cmhc-schl.gc.ca/en/nhs](https://cmhc-schl.gc.ca/en/nhs) for more detailed information regarding the NHS Priority Areas and the NHS Priority Population Groups.

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