

Applicant Guide 2024



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

Additional information can be found in the 'Resources' section of the NHS Research and Planning Fund webpage: cmhc.ca/rpf

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) **National Housing Strategy (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, Indigenous governments, and Indigenous organizations planning, undertaking, and sharing housing research.

The National Housing Strategy Research and Planning Fund supports the advancement of evidence-based research to understand and address housing challenges in Canada, particularly for populations that experience vulnerability in the housing system. It also seeks to promote collaboration, engagement, and alignment in housing research, and support the development of research capacity in the housing sector.

The NHS Research and Planning 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.

National consultations were launched in the summer of 2016 to gather the views of individual Canadians, housing organizations, experts and stakeholders. From these consultations, 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 plays a critical role as a national convenor to promote stability and sustainability in Canada’s housing finance system. Our mortgage insurance products support access to home ownership and the creation and maintenance of rental supply. Our research and data help inform housing policy.

By facilitating cooperation between all levels of government, private and non-profit sectors, we contribute to advancing housing affordability, equity, and climate compatibility. And we actively support the Government of Canada in delivering on its commitment to make housing more affordable.

CMHC is a Crown corporation, with a board of directors, and reports to Parliament through the Minister of Housing, Infrastructure and Communities, the Honourable Sean Fraser.

1.4 National Housing Strategy Overview

Affordable housing is a cornerstone of inclusive communities, helping to strengthen the middle class and grow the economy. Canada’s first-ever National Housing Strategy (NHS) is a 10-year, \$82+ billion plan that aims to give more Canadians a place to call home and create a new generation of housing in Canada.

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 NHS, visit placetocallhome.ca

1.5 NHS Research and Planning Fund Activity Streams and Eligibility

The NHS Research and Planning Fund provides financial support to not-for-profit organizations, registered charities, Indigenous governments, and Indigenous organizations for relevant projects in three different streams of activity:

- **Planning Activities** (requests of up to \$75,000 over a maximum duration of 12 months);
- **Research Projects** (requests of up to \$250,000 over a maximum duration of 24 months); and
- **Knowledge Mobilization Projects** (requests of up to \$75,000 over a maximum duration of 12 months).

Please be aware that while the NHS Research and Planning Fund offers financial support up to the specified maximum funding amount per project, all proposals must demonstrate the feasibility and reasonableness of their budget.

Activity Stream	Description	Eligible Activities*
<p>Planning Activity</p>	<p>An activity (or set of activities) conducted for the purposes of more clearly defining problems, issues, and opportunities, exploring approaches and methodologies, preparing and building capacity, and identifying resources for a future research project. Planning activities may 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.</p> <p>Organizations that do not have direct experience leading a research project are encouraged to apply for the Planning Activity stream.</p>	<ul style="list-style-type: none"> • Stakeholder consultations, including citizen engagement activities. • Needs assessments. • Environmental scan or preliminary synthesis of relevant literature, case studies, activities, or programs. • Gatherings of stakeholders and developing partnerships to facilitate regional, national and/or international collaboration between individuals or groups from a variety of backgrounds. • Hiring consultants to prepare research applications for groups that don't have the capacity to do so on their own.
<p>Research Project</p>	<p>A systematic, planned process that involves identifying key questions and developing new methods or using established methods (e.g., surveys, focus groups, interviews, literature reviews, 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) in order to deepen understanding, inform recommendations, or draw conclusions on a specific topic or issue.</p>	<ul style="list-style-type: none"> • 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. • Funding can also be used to support the hiring of consultants to conduct this work.
<p>Knowledge Mobilization Project</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"> • Designing, developing, and delivering knowledge mobilization strategies such as campaigns, presentations, mock-ups and models, in person or on-line forums and conferences, training and educational seminars, and engagement and facilitation activities.

* This list of eligible activities is not exhaustive or 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 for action and contributes to building collaboration, engagement, and alignment with stakeholders to achieve common research goals or supports the housing community's research capacity development.

What is a Relevant Project?

CMHC is seeking applications to support planning, research, and knowledge mobilization activities that address NHS priority areas for action and vulnerable groups. All projects must also align with the objectives of the NHS Research and Planning Fund (see Section 1.2).

The NHS priority areas for action are:

1. Housing for those in greatest need (including the following NHS priority vulnerable groups):
 - a. Survivors (especially women and children) fleeing domestic violence
 - b. Seniors
 - c. Young adults
 - d. People with disabilities
 - e. People dealing with mental health and addiction issues
 - f. Racialized groups
 - g. Newcomers (including refugees)
 - h. 2SLGBTQIA+ community
 - i. Veterans
 - j. Indigenous peoples
 - k. People experiencing homelessness
2. Community housing sustainability
3. Indigenous housing
4. Northern housing
5. Sustainable housing and communities
6. Balanced supply of housing

Please see Appendix 1 for more information on the NHS priority areas.

Who Can Apply?

CMHC is seeking applications from not-for-profit organizations, registered charities, Indigenous governments, and Indigenous organizations planning, undertaking, and sharing 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., community-based organizations, academia, private sector, municipal governments, or regional governments—including municipal or regional housing providers). Projects are highly encouraged to involve community-based organizations that represent and serve populations that are made vulnerable in the housing system.

Academic organizations or representatives can be project partners, but not the lead applicant.

SECTION 2 – APPLICATION AND SUBMISSION INSTRUCTIONS

2.1 Overview of Section 2

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

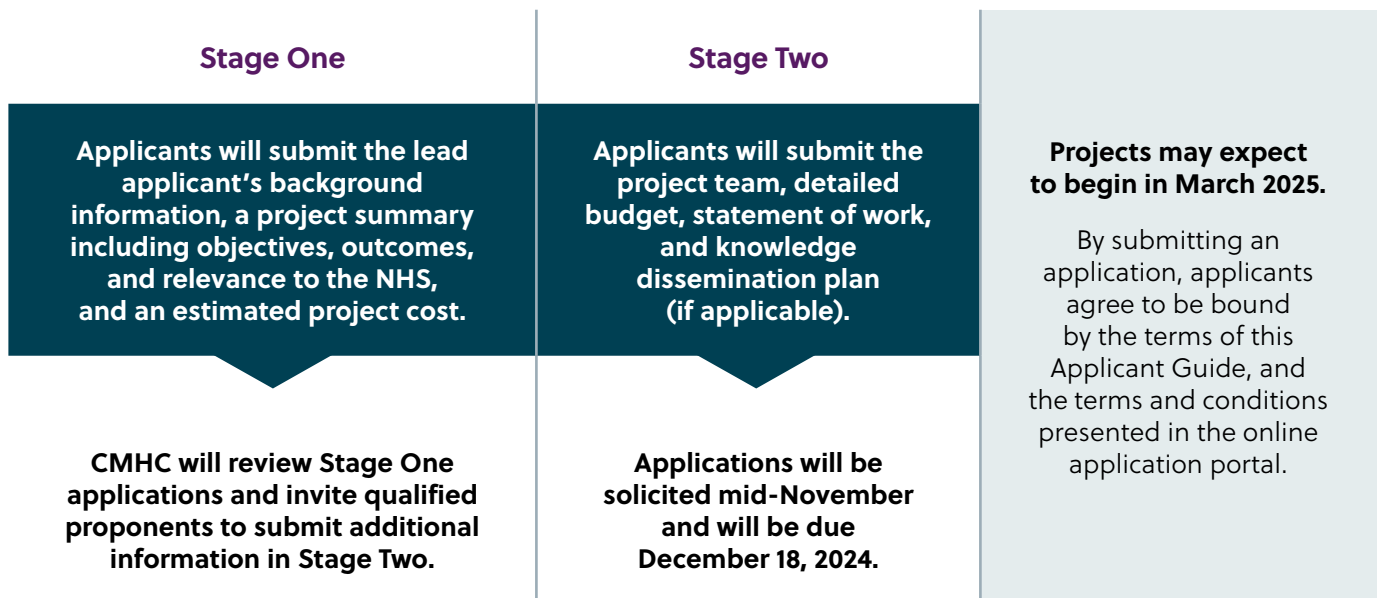
This section provides information to help applicants make sure, before they submit their application, that their application is complete and includes all the mandatory requirements (as indicated below).

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

2.2 Application Intake Process

The NHS Research and Planning Fund uses a two-step format for the application and review process. This makes it easier for community organizations to submit a proposal and also makes the process more efficient.

A call-out for Stage One applications will launch on August 12, 2024.



2.3 Submission Instructions and Deadline

2.3.1 Language of Application

Applications may be submitted in English or in French.

2.3.2 Delivery Instructions and Deadline

The NHS Research and Planning Fund application forms and the electronic portal for submitting the application (including all supporting documentation) can be accessed at cmhc.ca/rpf

The deadline to apply is 2:00 p.m. (in the respective time zone of the lead applicant organization) on September 27, 2024, for Stage One, and December 18, 2024, 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.

Supplementary documentation (e.g., curriculum vitae, partnership letters (financial contribution), etc.) must be submitted along with the application form through the same application intake portal.

Upon receipt of an application, 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 2.3.4 if they have not received a confirmation within 30 minutes of submission.

2.3.3 Application Opening, Verification Period, and Deadlines

Applications arriving after the submission deadlines for Stage One or Stage Two will be automatically rejected, and the lead applicant will be so notified by e-mail.

If an applicant cannot access the web portal for submitting their application (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 2.3.2 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, such as a case involving remote regions. Therefore, applicants **must** consult with CMHC before submitting an application by mail.

Timely and correct submissions of applications through the portal are the applicant's responsibility. 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.

2.3.4 Enquiries

All questions must be directed to the following contact person:

Amy Bolt, Research and Planning Fund Manager

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 before the application deadline.

2.3.5 Applicant Contact

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

2.3.6 Offering Period

The terms of this Applicant Guide will remain valid and binding on the applicant until such time as a contribution agreement is signed between the applicant and CMHC, not to exceed one hundred and twenty (120) days following the application deadline.

2.3.7 Changes to Application

It is strongly suggested that the applicant takes time to review their application before submitting it to minimize the need to make changes. If changes to an application that has been submitted through the portal are required, applicants must communicate with a CMHC representative through the enquiry channel indicated in Section 2.3.4.

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 of a new application, must be received no later than the submission deadline.

2.3.8 No Liability

While CMHC has made considerable efforts to ensure that the information in this applicant guide 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 process 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.

2.3.9 Verification of Application

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

2.3.10 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.

2.3.11 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.

If 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.

2.3.12 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 through the specified delivery portal 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, if CMHC or the application review committee determines that no application merits the award of any funding in any given year, it will not be awarded.

2.3.13 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. Funding will only be provided for activities that take place after the signing of the contribution agreement.

2.3.14 Indemnification and Insurance Requirements

By submitting an NHS Research and Planning Fund application, the applicant understands and acknowledges that, should the project be accepted, the applicant shall, at their own expense, procure and maintain or cause to be procured and maintained insurance coverage that is commercially reasonable and customary for businesses of similar industry practices and that 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, such as (but not limited to) Commercial General Liability, Errors and Omissions Liability, and Workers Compensation.

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

2.3.15 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_2022.html

SECTION 3 – PREPARING AN APPLICATION

3.1 Where to Apply

The NHS Research and Planning Fund uses an online application intake process. See Section 2.3.2 and Section 2.3.3 of this guide for information on obtaining an application form and the online application portal.

The application form must be submitted in accordance with the conditions and requirements set out below and as stated in the delivery instructions in sections 2.3.2 and 2.3.3 to be considered for evaluation by CMHC.

If it is not possible to submit the application through the online portal (e.g., sending from a remote location without Internet access), or if an application is required in an alternate format, applicants must reach out to CMHC (see 2.3.4) at least twenty (20) business days before the application deadline to see whether an alternative arrangement can be accommodated.

3.2 Stage One – Application Form

3.2.1 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 lead 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 Lead 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 of Activity

Applications are accepted in three distinct project stream of activity :

- Planning activities
- Research projects
- Knowledge mobilization projects

Applicants should select one project stream of activity 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 NHS Research and Planning Fund per competition cycle.

A.4 Project Areas of Focus

Please indicate whether your proposal focuses primarily on technical or socioeconomic 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 vulnerable groups, 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 the granting of funds from the NHS Research and Planning Fund is successful.

3.2.2 Section B: Eligibility Criteria

B.1 Lead Applicant Eligibility

- Lead applicant must be an active not-for-profit, charitable, or Indigenous organization, or an Indigenous government, 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., community-based organizations, academia, private sector, municipal governments).

B.2 Project Eligibility

- The project must address one or more NHS priority areas for action.
- At time of application, partner contributions totalling 25% of the total project cost must be confirmed.
- The project must not have been funded through the NHS 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 signing of the contribution agreement.

3.2.3 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 and how it relates to the National Housing Strategy). The title will be used to identify the project both at CMHC and publicly.

C.2 Project Period

The applicant must clearly identify the project start date and end date. Projects are expected to commence in March 2025. Planning Activities and Knowledge Mobilization Projects are expected to be delivered and completed within 12 months from the signing of the contribution agreement. Though Research Projects may be delivered and completed within 24 months from the signing of the contribution agreement, if the project is to last longer than 12 months, please justify.

C.3 Estimated Total Project Cost

In this section, the applicant must state the total cost of 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 Estimated Partner Contributions

Applicants are required to demonstrate a 25% contribution of the total project cost (Section C.3), 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 offset and pay for project expenses incurred during the design, delivery, and implementation of the project.

For an example of eligible project activities, see Section 1.5 of this Applicant Guide. Other expenses related to the carrying out of 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 Estimated Total Funding Requested from the NHS 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, if applicable) 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 Stage Two application. The letter must include the specific cash or in-kind contributions being provided by the partner organization in support of the proposed project.

For the purposes of the NHS Research and Planning 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. The project team will be requested as part of the Stage Two application. 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.

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

3.2.4 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.

D.1 Project Summary/Description (550 Words)

Provide an overview of the project, including a description of the issue, gap, research questions (if applicable), and activities to be completed. Consider the following:

- What issue, gap, or question is the project trying to address?
- Why is it important?
- What activities will be completed to address the issue, gap, or question?

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 are the proposed objectives and expected outcomes of the project?
- Do the objectives of the project align with the project's expected outcomes?

D.3 Project Relevance (500 Words)

Please explain how the project aligns to the NHS priority areas for action, 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), and relevant background documents in order to demonstrate that the project aligns with the NHS priority areas for action. Provide a 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 in the North (if applicable), and any innovative strategies that increase affordability?
- Will the project 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 vulnerable groups?
- Does the project address a gap in the housing system?

3.2.5 Section E: Organization Descriptions

Please include an organization description for the lead organization and partner organizations, as listed in C.6.

3.2.6 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, since it will not be assessed by the adjudication panel.

3.3 Stage Two – Application Form

Please only complete the Stage Two application form if invited by CMHC.

3.3.1 Section A: General Information

Please confirm the lead applicant’s contact information.

3.3.2 Section B: Project Overview

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

A letter from each contributing project partner must be included with the application. The letter must indicate the specific cash or in-kind contributions being provided by the partner organization in support of the proposed project.

B.6 Project Team Details

Please list each team member involved in the project. The Stage Two application package must also include a brief organization description (if not already provided during Stage One) and a CV for each team member (for Research Projects and Knowledge Mobilization Projects). CVs are not required for applicants to the Planning Activity Stream. 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 groups 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 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 does the expertise of the proposed team members align with the project 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? What will be their specific role and contribution?
- Does the composition of the team strengthen project outcomes through collaboration?

B.7 Indigenous Nations Consultation

If the proposed project occurs within or adjacent to a 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.

3.3.3 Section C: Project Details

C.1 Budget

In preparing the application, the applicant should provide a budget for the total project cost (B.2), uploaded as a separate document. Though there is no template for the budget, it should be broken down by fiscal year (April 1–March 31), project phases (if applicable), key deliverables, and cost category (i.e. personnel, technology and materials, travel). It should describe all costs associated with the proposed project activities and all proposed sources of revenue (e.g., funds requested through the NHS Research and Planning Fund, cash, or in-kind contributions) for these activities. The budget must be inclusive of taxes, if applicable. The budget will be evaluated for its reasonableness and feasibility.

C.2 Statement of Work/Methodology/Project Activities (1,500-2,000 Words)

Please provide a detailed breakdown of all the relevant and key activities, tasks, and 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.

It may be beneficial to break down the Statement of Work by project phase, and include an estimated timeline of each phase and/or activity, assuming a project start date of March 2025.

Please note that projects will be required to submit deliverables and/or progress reports at a minimum frequency of every six months. At project completion, projects must submit a final report for publication in the Housing Knowledge Centre, an overview of knowledge dissemination activities (if applicable), and a financial statement report. Please incorporate interim and final deliverables into the Statement of Work.

Though this section will vary depending on the activity stream and scope of the project, it may be useful to consider the following:

- What issue, gap, or question does the project seek to address?
- What are the proposed activities and/or methodology? Please describe the design, delivery, and implementation of project elements.
 - How does the project incorporate a Gender-Based Analysis Plus (GBA+) or other intersectional approach?
 - How does the project incorporate appropriate ethical considerations including privacy and confidentiality?
- How will the project be carried out, why, and by whom? What partners will be involved in the project, and how are these partnerships and relationships appropriate with respect to the delivery and implementation of the project?
- What are the different phases, milestones, tasks, activities, and any stage gates or dependencies including start/end dates per phase, key dates for milestones, and an overall project timeline?

- What are the anticipated results and outcomes, including key deliverables? How will they be communicated to CMHC and other stakeholders?
- Based on the anticipated outcomes, what would be the expected next steps?
 - For Planning Activities, how does this project prepare the lead organization and partner organizations for subsequent research-related activities?
- For Knowledge Mobilization Projects, what are the key knowledge mobilization strategies, and what knowledge products will be produced? Who are the intended audiences, and why are they the target?
- How will the immediate impact and longer-term success be measured and how it will contribute to NHS priorities, government objectives, and sector objectives?

Please note that it is imperative that this section be well-constructed, coherently written, organized, and comprehensive (i.e. no information gaps).

3.3.4 Section D: Knowledge and Dissemination Plan (For Planning Activities and Research Projects)

The overarching objective of the NHS 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.

For Research Projects, 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). A high-level overview of the approach and strategy should also be described in Section C.2 Statement of Work/ Methodology/Project Activities.

For applications to the Planning Activities stream, the knowledge and dissemination plan may focus on how the planning activities will prepare the lead and partner organizations for subsequent research-related activities, and how the lessons learned will be shared with relevant stakeholders.

This section does not need to be completed for applications to the Knowledge Mobilization Project stream, as the associated information should be detailed in Section C.2 Statement of Work/Methodology/Project Activities.

3.3.5 Section E: Curriculum Vitae

Applicants submitting proposals to the Research Project and Knowledge Mobilization Project streams must upload a CV for 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

3.3.6 Section F: Application Checklist

Stage Two Checklist (if invited to apply by CMHC)

Stage Two application form

Additional partner organization descriptions (if not included in Stage One)

Letters confirming contribution of partner organizations

Curriculum vitae(s) (for Research Projects and Knowledge Mobilization Projects)

Budget

Please do not include any additional material, since 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 for the relevant project stream of activity listed in Section 4.3. Proposals must reach 80% for each criterion to be considered successful. CMHC may engage external reviewers to assist in scoring proposals.

Stage One selection process: Reviewers will score applications against the first criterion listed in Section 4.3: Concept, including relevance to NHS priority areas for action. Proposals must reach 80% to be considered for Stage Two.

Stage One selection timeline: CMHC anticipates inviting successful Stage One applicants to submit additional information for Stage Two in November 2024.

Stage Two selection process: For Stage Two, reviewers will score applications against criteria 2, 3, and 4 (for their specific project stream of activity) in Section 4.3. The evaluation criterion considered in Stage One will not be re-evaluated at Stage Two. Proposals will be selected based on combined scores from Stage One and Stage Two, 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 proposal. In that case, CMHC will prioritize proposals with a higher combined score. Please note that all four evaluation criteria are weighted equally (i.e. each makes up 25% of the overall score).

Stage Two selection timeline: CMHC anticipates notifying successful applicants no later than February 2025.

4.3 Evaluation Criteria

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

Planning Activities

1. **Concept**, including relevance to NHS priority areas for action (25%)
2. **Approach**, including objectives, key activities, and milestones (25%)
3. **Potential for impact**, including lessons learned and potential for future research activities (25%)
4. **Project management and feasibility**, including roles and responsibilities of project team and partners, reporting mechanisms, and the reasonableness of the budget (25%)

Research Projects

1. **Concept**, including relevance to NHS priority areas for action (25%)
2. **Approach**, including objectives, research methodology, key activities, and milestones (25%)
3. **Potential for impact**, including knowledge mobilization strategies, knowledge products, and the appropriateness of audiences (25%)
4. **Project management and feasibility**, including roles and responsibilities of project team and partners, reporting mechanisms, and the reasonableness of the budget (25%)

Knowledge Mobilization Projects

1. **Concept**, including relevance to NHS priority areas for action (25%)
2. **Approach**, including objectives, key mobilization strategies, knowledge products, and milestones (25%)
3. **Potential for impact**, including the appropriateness of audiences and next steps (25%)
4. **Project management and feasibility**, including roles and responsibilities of project team and partners, reporting mechanisms, and the reasonableness of the budget (25%)

Applications are scored 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 FOR ACTION

Priority Areas for Action

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

Community 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 for more detailed information regarding the NHS priority areas for action and vulnerable groups.