



## **Special Initiatives Grant Guidelines**

*Updated January 2023*

### **Mission**

The mission of the Blue Cross Blue Shield of Massachusetts Foundation is to ensure equitable access to health care for all those in the Commonwealth who are economically, racially, culturally, or socially marginalized.

The Foundation defines health as a state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity. The Foundation recognizes that structural racism is a public health issue and that access to affordable, quality health care is a racial and social justice issue.

### **Special Initiatives Program Overview: What We Are Interested in Funding**

The Special Initiatives grant program provides organizations with a one-time grant of up to \$50,000 to pilot or launch a new project over a one-year period. Special Initiative grants are intended to fund projects which empower communities to advance health equity at the community level. Projects should positively impact the health or health care related needs of those Massachusetts residents who have been economically, socially, culturally, or racially marginalized. If successful, it is hoped that these projects can be sustained, scaled, and potentially, replicated.

Special Initiative grant proposals must align with one or more of the Foundation's three focus areas: access to health coverage and care, access to behavioral health services, and elimination of structural racism and racial inequities in health. Projects must serve the Foundation's populations of focus: Massachusetts residents who are economically, racially, culturally, or socially marginalized.

We encourage applicants to read the Foundation's principles on the website to learn more about our approach and priorities and the Special Initiatives grant program Frequently Asked Questions for more information.

Proposals should:

- Clearly describe how the project will advance health equity and address community identified health needs and priorities.

- Identify a clear project scope and plan that is achievable within the **one-year timeframe** of the grant program; including concrete goals that the organization expects to achieve, ensuring that the goals are **specific, measurable, attainable, and realistic with a clear timeframe.**
- Identify an attainable plan for community engagement and community building (if applicable).
- Identify key partners (if applicable) and specific roles in program implementation and agreements about how partners will work together.

Proposals are accepted and reviewed twice a year (see below for timelines). This grant program does not require a Letter of Inquiry. The Foundation reserves the right to make grant awards in amounts less than \$50,000.

### **Eligibility**

- Organizations with a 501c (3) tax-exempt nonprofit designation from the IRS or operate under the fiscal sponsorship of a tax-exempt nonprofit.
- Organizations that primarily serve people who have been socially, economically, culturally, or racially marginalized.
- Organizations proposing projects that align with the mission and focus areas of the Foundation.
- The Foundation is especially interested in funding organizations that are people of color-led and/or whose leadership reflects the demographic composition and lived experiences of the communities they serve.

### **The following will not be funded:**

The Foundation does not accept applications from religious institutions, for-profit institutions, or individuals. Also, the Foundation does not fund proposals to support ongoing operating costs, such as direct medical or clinical care, long-term care, hospice, and palliative care. The Foundation does not fund projects focused on addressing one specific disease or medical condition. The Foundation also will not fund events, conference sponsorships or capital expansion projects.

In addition, the Special Initiatives grant program will not support:

- Expansion or ongoing support of an existing program – this includes taking a proven project to a new location.
- Stand-alone staff training that is not an integral part of the proposed program.
- Marketing and outreach supplies (such as shirts, water bottles) and basic needs items (food, hygiene items, rental assistance).
- Salaries for new positions with no evidence of sustainability beyond the grant period.

For examples of successful Special Initiatives applications, please review recently funded organizations please review examples of recently funded organizations on the website.

## Deadlines and Submission Requirements

According to the schedule below, applicants must submit full proposals – including budget documents – through the Foundation’s online portal.

The Special Initiatives grant program is competitive, with demand far outpacing the resources available to fund proposals. The Foundation has worked to streamline the application process and values the time commitment it takes to submit a request. Please review the eligibility requirements, grant guidelines and supporting documents closely to assess your organization’s alignment prior to applying.

The proposal narrative and budget documents are below for your reference. This is not the official application. All applications must be submitted via the Foundation’s online grantmaking portal. Using the questions below as a guide, we encourage you to develop your proposal in a Word document first to ensure the appropriate number of characters before transferring your final submission to the online portal.

Requirement	Proposal Due Date	Notification of Awards
Submit full proposal through the online portal; <b>no Letter of Inquiry</b>	March 2, 2023 September 11, 2023	May 15, 2023 December 29, 2023

***All proposals are due by 12:00 p.m. on the date of the deadline. Please note there will be no technical support available for the online portal after the noon deadline. Character count limit does include spaces.***

### Full Proposal Narrative

1. Challenge/Opportunity: What community identified health or health-related need is the project intended to address? (1,000 characters)
2. Population of Focus: Who will benefit from and be affected by this project? (1,000 characters)
3. Project Description: What is the proposed project? How will it address the identified health or health-related need and advance health equity? Please include goals that are SMART (specific, measurable, attainable, and realistic given the one-year grant timeframe. This section should also address how you will know the project is successful. (4,000 characters)
4. Project Management: Who are the people that will lead this effort, and what factors most predict their ability to achieve success? (500 characters)
5. Community Engagement: What is your community engagement or community building strategy (if applicable). (1,000 characters)
6. Collaboration: Who are the key partners for the proposed project (if applicable), what specific roles will they play in program implementation and, do you have formal or informal agreements in place to support that collaboration? (1,000 characters)

7. **Project Follow-Up:** If you plan to continue the project after this one-year grant period, what is your sustainability plan and what funding will you use to support it? (1000 characters)

### **Additional Attachments**

Organizations will be required to submit the following attachments:

- I. **Project Budget Worksheet:** Utilizing the budget worksheet available on the portal, describe how the funding will be allocated to cover expenses.
- II. **Budget Narrative Template:** The budget narrative should justify the budget. The narrative details must explain how and where the grant funds will be used. If additional funding beyond those requested from the BCBSMA Foundation is required, indicate that on the Project Budget and describe on the Budget Narrative where the additional funding is coming from, whether it is secured, and what proportion of the overall project budget would be supported by the grant from BCBSMA Foundation.

*The Foundation will prioritize proposals for projects where BCBSMA Foundation is funding at least 1/3 of the project budget. The Foundation supports collaborative grantmaking and we also believe that it is important to track the specific impact of the Special Initiative grant dollars.*

*Applicants with questions about whether their proposal meets this threshold are encouraged to contact the Foundation.*

- III. **Organization Budget:** Upload your organization's board or department-approved budget for the most recent full year.

### **IV. Tax Exempt Letter**

#### **Questions**

Applicants are welcome to contact Foundation staff with any questions as they develop their proposals. For proposal development questions, please contact: Jacquie Anderson, Senior Director of Grantmaking [Jacquie.Anderson@bcbsma.com](mailto:Jacquie.Anderson@bcbsma.com)

For technical and logistical questions related to accessing the online grantmaking portal, please contact: Evelyn Monteiro, Grants Management Administrator; [Evelyn.Monteiro@bcbsma.com](mailto:Evelyn.Monteiro@bcbsma.com)

**Organization Name:**

**Grant Program Area:**

**Grant Period:**

*\*\* Foundation will prioritize proposals for projects where the BCSBS MA Foundation is funding at least one-third of the project budget. The Foundation supports collaborative grantmaking and we also believe that it is important to track the specific impact of the Special Initiative grant dollars.*

<b>Personnel</b>	<b>Base Salary</b>	<b>FTEs</b>	<b>Total</b>	<b>BCBSMA Grant</b>	<b>Other** Support</b>
Project Director					
Project Staff					
Administrative Staff:					
Other Staff:					
Fringe Benefits (____%)					
Sub-Total					
<b>Other Direct Costs:</b>					
Office Operations					
Equipment					
Meeting Expenses					
Marketing/Communications/Outreach					
Travel					
Project Space					
Evaluation					
Other:					
Sub-Total					
<b>Purchased Services</b>					
Consultants					
Contracts					
Sub-Total					
<b>Indirect Costs (15% Foundation approved rate)*</b>					

TOTAL



## Budget Narrative Template

An important component of the submission process is the preparation of a budget narrative. The budget narrative should justify the budget. The narrative details must explain how and where the grant funds will be used. Your best judgment should be used when projecting program expenses.

**You should:**

- Complete all **Categories** and **Sub-categories** in the table shown below and explain how the funds for this line item will be spent.

**NOTES:**

- If any of the Categories (e.g. Personnel, Other Direct Costs) or Sub-categories (e.g. Other Staff, Travel, Consultants) are not relevant to your budget, you may delete them from the table.
- If additional funding beyond those requested from the BCBSMA Foundation is required, describe on the Budget Narrative where the additional funding is coming from, whether it is secured, and what proportion of the overall project budget would be supported by the grant from BCBSMA Foundation.
- *The Foundation will prioritize proposals for projects where BCBSMA Foundation is funding at least 1/3 of the project budget. The Foundation supports collaborative grantmaking and we also believe that it is important to track the specific impact of the Special Initiative grant dollars.*

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Category	Narrative
<b>Personnel: list each position and name of individual under the appropriate sub-category, along with base annual salary, FTE (full-time equivalency or percentage of effort), amount requested, and a detailed description of their planned activities related to the project.</b>	
Project Director	
Project Staff	
Administrative Staff	
Other	
Category	Narrative
<b>Other Direct Costs: for each category, list the components by item and amount. For Project Space, provide the basis used to calculate the amount requested.</b>	
Office Operations	
Equipment	
Meeting Expenses	
Communications/ Marketing/Outreach	
Travel	
Project Space	
Evaluation	
Other	
<b>Purchased Services</b>	
Consultants	
Contracts	
Additional Funding	