

## 2017 Housing Opportunities

# Inquiry Application Preview + GrantIS Instructions

*On March 15, Meyer will begin accepting Inquiry Applications through the GrantIS application portal. Submitting an Inquiry Application is the first step in our funding process.*

*The information below is a preview of the online Inquiry Application process and questions. This Word document is intended as a helpful worksheet before you begin the online application.*

*If you have any difficulty using or logging into GrantIS, please call 503.228.5512 and ask for the grant operations department or send an email to* *grantsadmin@mmt.org**. We will get back to you as soon as possible.*

Completing Meyer's Inquiry Application involves answering questions that provide an overview of your organization and proposed project. **There is a 2,000-word limit for the total inquiry. (Allocation of word count among the answers is determined by the applicant.)**

The inquiry review process normally takes approximately 65 days following the inquiry deadline.

# The Housing Opportunities Inquiry Application will request the following information:

#### The Request:

With which of the Housing Opportunities portfolio goal does your request best align? (applicants must select one of the portfolio goals)

Which of the Housing Opportunities portfolio’s outcome(s) are most relevant to your request? (applicants may select up to two outcomes associated with the goal they selected)

See the Housing Opportunities goals and outcomes at [www.mmt.org/portfolio/housing/goals-outcomes](http://www.mmt.org/portfolio/housing/goals-outcomes).

Will this proposal primarily serve Oregonians living at or below 60% Area Median Income (AMI) or Median Family Income (MFI)? yes/no. If you answered “no” to this question, please contact us.

#### Proposal Summary + Type of Request:

Short Description of Your Proposal (20-word limit): (your description should make clear what you seek to accomplish through this proposed grant and who will benefit/who you will serve)

Proposed Project Start Date:

What counties will your project serve and/or take place in?

Will your project take place in and/or serve any Tribal reservations?

Are you applying on behalf of an eligible Collaborative? (as defined by Meyer at [www.mmt.org/apply/applicant-resources/collaborative-proposals](http://www.mmt.org/apply/applicant-resources/collaborative-proposals)) check yes/no

If yes, show this question:

Are you applying for a planning grant for an emerging collaborative? yes/no (If yes, skip the confirming statements below)

*Please confirm that you meet all of the following Meyer eligibility components to apply for a Collaborative grant:*

* Collaborative structure and priorities are inclusive and demonstrate equitable approach; yes/no
* Roles and responsibilities of collaborative partners are clearly defined and demonstrate an equitable approach yes/no; and
* Decision making processes demonstrate an equitable approach yes/no.

*If you did not respond “yes” to all of the above, please contact us before proceeding.*

What type of funding are you requesting? (Select one)

* Project Support
* Capacity Building Support
* Operating Support
* Capital Construction Support

#### Demographic Data:

Meyer seeks to partner with organizations that are committed to diversity, equity and inclusion (DEI) in their work and partnerships, and your demographic data is one tool to help us learn about that commitment.

The questions below are intended to summarize more detailed data that you collect within your organization. Please use your own data collection tools, Meyer’s Demographic Data Worksheet (available on our Diversity, Equity + Inclusion Resources page at

[www.mmt.org/applicant-resources/diversity](http://www.mmt.org/applicant-resources/diversity)) or a similar type of tool to help inform your responses. If you are invited to submit a full proposal, we may request more detailed information.

We recognize that many organizations do not collect sufficient data to answer all of these questions. We ask you to share whatever data you do have and to let us know when you don't have sufficient data. We also encourage you to consider how you might collect additional demographic data to fill the gaps in your knowledge. You can find tools and ideas to help support this work on Meyer’s Diversity, Equity + Inclusion page ([www.mmt.org/applicant-resources/diversity](http://www.mmt.org/applicant-resources/diversity)), including the definitions of terms in the questions that follow.

Please note that while we prioritize funding to organizations that share our DEI commitment, we are interested in supporting a wide range of organizations at various points in their DEI journey.

### About your request

Does this request include strategies designed to specifically serve or benefit one or more of the following populations?

|  |  |
| --- | --- |
|  | **Yes** |
| People of color | **⬜** |
| Low income people | **⬜** |
| Indigenous communities and tribes | **⬜** |
| Immigrants and refugees | **⬜** |
| Lesbian, gay, bisexual, transgender or other sexual minorities | **⬜** |
| People with disabilities | **⬜** |
| Women or girls | **⬜** |
| Aging/ elderly | **⬜** |
| Crime/ abuse survivors | **⬜** |

This request aims to benefit all communities generally, and does not include strategies to specifically benefit any of the above populations.

Are you requesting funding for work that will primarily take place in and/or serve any rural communities? (yes/no)

Please visit [www.mmt.org/apply/applicant-resources/rural](http://www.mmt.org/apply/applicant-resources/rural) for information about how Meyer thinks about rural.

### About your organization

Please describe the population(s) served by your organization overall, which may be broader or otherwise different from the population(s) that you indicated above will be targeted with this funding request. Include demographic information as well as other characteristics that are relevant to your work.

To what extent do the demographics of your staff, board and volunteers (if applicable) reflect the demographics of the population you serve and the demographics of the broader community in your service area?

*Demographics of your board and staff:*

Indicate below what percentage of your board and staff are people of color. If it is helpful, you can use the Race and Ethnicity tab of Meyer’s Demographic Data Worksheet (available on our Diversity, Equity + Inclusion Resources page at

[www.mmt.org/applicant-resources/diversity](http://www.mmt.org/applicant-resources/diversity)) to calculate this information.

|  |  |  |
| --- | --- | --- |
| % board that are people of color | ⬜ | Insufficient data available to answer this question |
| % staff that are people of color | ⬜ | Insufficient data available to answer this question |

Provide information on the demographics of your board and staff for any other demographic categories that are important to your organization (optional). If it is helpful, see the Additional Demographic Data tab of Meyer’s Demographic Data Worksheet (available on our Diversity, Equity + Inclusion Resources page at

[www.mmt.org/applicant-resources/diversity](http://www.mmt.org/applicant-resources/diversity)) for examples.

|  |  |  |
| --- | --- | --- |
| **Demographic Category** | **% of board** | **% of staff** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Use the checkboxes to provide more details about the data sources for your answers to the above questions. For more information on how we define “actual” vs. “estimated” data, see Meyer’s Diversity, Equity + Inclusion Resources page ([www.mmt.org/applicant-resources/diversity](http://www.mmt.org/applicant-resources/diversity)).

|  |  |  |  |
| --- | --- | --- | --- |
|  | Our responses are based on actual data (e.g. surveys, intake forms, self-reports, etc.) | Our responses are based on estimated data | We are not currently collecting this information |
| Data for board | **⬜** | **⬜** | **⬜** |
| Data for staff | **⬜** | **⬜** | **⬜** |
| Data for population served | **⬜** | **⬜** | **⬜** |

#### Organization Summary:

Briefly summarize your organization’s purpose, major work/programs, and two examples of recent accomplishments.

#### Diversity, Equity + Inclusion

Please describe your organizational commitment to diversity, equity and inclusion and provide up to two examples of how it shapes or will shape your programmatic work and up to two examples of how it shapes or will shape your internal operations.

#### Organization Budget:

State your organization’s current annual operating budget amount: $ \_\_\_\_\_\_\_\_\_

#### Organization Surplus/Deficit:

Please enter your current budget surplus or deficit for the CURRENT FISCAL YEAR. For deficits please use the minus sign before the amount.

$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### Brief Financial History

Please provide total revenue and expenses for the prior three fiscal years, starting with the most recent year first.

|  |  |
| --- | --- |
| **Fiscal Year Total Revenue Total Expenses** | **Surplus/Deficit** |
| $ $ | $ |
| $ $ | $ |
| $ $ | $ |

If you have indicated an operating deficit in the table above and/or have had significant surpluses or changes in budget size, please explain.

### About your project:

# Depending on the type of funding you request, you will also be asked for the following information:

#### Collaborations:

Briefly describe the purpose of the collaboration and date the collaboration was formed.

List the organizations that would receive funds under this proposal and the amount of funds each would receive.

#### Project Support:

Summarize the project for which funds are requested. Please include: 1) the nature of the problem/opportunity you aim to address in the community you serve; 2) your approach to addressing the problem/opportunity; 3) why you selected this approach; 4) how communities impacted by the problem/opportunity have been involved in shaping both your understanding of it and your proposed approach to addressing; 5) what results you are aiming for and how they advance the portfolio goal and outcomes you selected.

*Budget:*

* Total project costs
* Total amount requested from Meyer:
* Amount received or pledged thus far
* Please list the amount of funding you are requesting for each year of the project.
* Anticipated source(s) of remaining funds

Please upload the project budget that includes both expenses and revenue by category. You may use your own format or our template, which you can find at [www.mmt.org/apply/applicant-resources/budgets-financial-resources](http://www.mmt.org/apply/applicant-resources/budgets-financial-resources).

#### Capital Support:

Summarize the project for which funds are requested. Please include: 1) the need for the project in the context of the community you intend to serve; 2) why the location you selected is desirable; 3) what you intend to accomplish and how this effort also advances the Housing Opportunities portfolio goal and outcome(s) you selected.

Do you have site control?

*Budget:*

* Total project cost:
* Total amount requested from Meyer:
* Amount received or pledged thus far:
* Please list the amount of funding you are requesting for each year of the project.
* Anticipated source(s) of remaining funds
* Please upload the project budget that includes both expenses and revenue by category. You may use your own format or our budget template, which you can find at [www.mmt.org/apply/applicant-resources/budgets-financial-resources](http://www.mmt.org/apply/applicant-resources/budgets-financial-resources).

#### Capacity Building Support:

Summarize the capacity building project for which funds are requested. Please include: 1) the problem/opportunity you are working to address; 2) what you intend to accomplish and what steps you plan to take to get there; 3) what planning you have done so far; and 4) how strengthening your organization advances the Housing Opportunities portfolio goal and outcome(s) you selected.

*Budget:*

* Total project cost:
* Total amount requested from Meyer:
* Amount received or pledged thus far:
* Please list the amount of funding you are requesting for each year of the project.
* Anticipated source(s) of remaining funds
* Please upload the project budget that includes both expenses and revenue by category. You may use your own format or our budget template, which you can find at [www.mmt.org/apply/applicant-resources/budgets-financial-resources](http://www.mmt.org/apply/applicant-resources/budgets-financial-resources).

#### Operating Support:

Summarize the key goals of your organization’s strategic plan over the proposed grant period. Please include: 1) the need for your work in the community you serve; 2) what strategies you will use to advance your goals; 3) two to three high level results you are aiming for; 4) how these results advance the Housing Opportunities portfolio goal and outcome(s) you selected; and 5) how you ensure that your work is regularly informed by and accountable to the communities you serve?

*Budget: (your operating budget times the number of years funds are requested for, with any adjustments for anticipated changes in future years)*

* Total amount requested from Meyer:
* Please list the amount of funding you are requesting for each year.
* Do you anticipate any significant changes to your organization’s operating budget over the grant period? If yes, please explain.
* Please upload current operating budget that includes both revenues and expenses.