



# 2017 Housing Opportunities

## *Annual Funding Opportunity*

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**Meyer invites inquiries that will open doors to opportunity and strengthen communities through safe, affordable housing.**

We will accept Inquiry Applications from March 15 to April 19, 2017 at 5pm.

This document outlines everything you need to know to get started. For more information, please visit the Applicant Resources pages on our website:

[www.mmt.org/apply/applicant-resources](http://www.mmt.org/apply/applicant-resources).

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## ABOUT THE PORTFOLIO

Decent, safe and affordable housing and the stability it offers helps us to build better lives and strengthen communities. The vision of Meyer's Housing Opportunities portfolio is that every Oregonian has a safe, decent and affordable place to call home.

### **Equity Lens**

Identifying and closing disparities is core to Meyer's mission. All Housing Opportunities investments are framed within an overarching equity lens, with funding targeted to under-resourced communities including communities of color, underserved rural communities and other vulnerable populations. Funding will be prioritized for projects that reach Oregonians with incomes at or below 60 percent Area Median Income (AMI) or Median Family Income (MFI).

Equity is a central tenet in all of Meyer's grantmaking. All applicants — regardless of where they may be today — must demonstrate a commitment to ongoing growth through the integration of diversity, equity, and inclusion (DEI) principles into both their external programming or services and internal structures and operations.

This Annual Funding Opportunity supports the funding goals of Meyer's core housing program. For information on our Affordable Housing Initiative funding opportunities, including our **Housing Advocacy Request for Proposal** (accepting proposals through April 5, 2017), please visit [www.mmt.org/affordable-housing-initiative-rfp](http://www.mmt.org/affordable-housing-initiative-rfp).

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## FUNDING GOALS

All proposals must advance one of the following Housing Opportunities core funding goals:

- Preserve and increase the number of affordable housing rental units.
- Support the housing stability and success of Oregonians living on low incomes.
- Strengthen the housing sector by building capacity, diversity, equity and inclusion, and collaboration.

Meyer has identified several intended outcomes under each of these goals. Applicants will be asked to indicate which goal (only one) and which of its associated outcomes (up to two) that their proposed work best supports. Applications that do not make a strong and clear connection to at least one of Meyer's intended outcomes will not be successful.

Read more about the Housing Opportunities core funding goals, intended outcomes and examples of what we may fund in this round later in this document or visit [www.mmt.org/portfolio/housing/goals-outcomes](http://www.mmt.org/portfolio/housing/goals-outcomes).

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## AVAILABLE FUNDING

**Meyer anticipates awarding approximately \$3.8 million for this funding opportunity in 2017 for projects, programs, capacity-building efforts, operating support and capital support that will advance our Housing Opportunities core funding goals.**

We aim to fund a broad scope of projects and strategies in rural, suburban and urban communities across the state, including efforts on Tribal lands. We anticipate funding projects that address a range of housing opportunity issues and challenges and use a variety of approaches to achieve our goals. Taken as a whole, we expect the Housing Opportunity portfolio to include an array of different types of housing preservation and development projects, systems-level policy change initiatives, collaborations among housing organizations and other partners, supportive services provided by individual agencies or collaboratives, and organization-specific capacity building projects.

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## WHAT DOESN'T FIT

Some projects related to affordable housing do not fit within Meyer's goals, either because they focus on other parts of the housing continuum or are not able to track outcomes important to Meyer. Please note that Meyer does not intend to fund the following through this opportunity:

- Grants to build or operate emergency shelter or transitional housing;
- Grants to support emergency shelter or short-term transitional housing that does not prepare for or connect with permanent housing;
- Grants to build or support single family home construction, unless it is linked to a larger-scale strategy to Mitigate Displacement at a neighborhood level.
- Projects that might affect an individual's ability to secure housing, but which do not propose to track or measure the actual experience of people to access and retain housing.
- Projects that support positive impacts in other systems of care (e.g., public health impacts, etc.), but do not demonstrate measurable positive impacts related to housing stability and success.

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## GRANT TYPES + AMOUNTS

### **Project Support:**

- For services and interventions to support resident housing stability and success, typical project grants will be \$75,000 to \$125,000 total over two to three years. We will consider grants up to \$175,000 over three years if there is significant justification for a larger grant amount.
- For large collaborative projects that will share funding among multiple organizations, we will consider grants of \$175,000 to \$250,000 over two to three years. For more information about collaborative projects, please visit [www.mmt.org/apply/applicant-resources/collaborative-proposals](http://www.mmt.org/apply/applicant-resources/collaborative-proposals). If you are interested in a grant for a larger collaborative project, we strongly encourage you to call and speak to a member of our housing team for guidance.

### **Capacity Building Support:**

- For support of projects to build capacity within housing organizations, undergirded by careful strategic planning and bolstered by commitment from board, staff and other supporters, typical project grants will be \$75,000 to \$125,000 total (depending on organizational size) for two to three years.

- We will consider grants up to \$175,000 over three years if there is significant justification for a larger grant amount.
- For technical assistance and collaborative planning efforts, grants will be considered in the \$10,000 to \$35,000 range for one year.

### **Operating Support:**

- For general support of organizations that strongly advance the Housing Opportunities core program goals and do a majority of their work in affordable housing;
- Organization or collaborative should play a unique and/or important role in the field and have wider impact for the sector (e.g., as an intermediary, is seen as a field leader in Oregon or nationally); and
- The organization must have DEI strategies as a meaningful part of its workplan for the grant period; and
- Demonstrates leadership for diversity, equity and inclusion (DEI) in the context of the community where its works.
- Operating support grants will be \$100,000 to 150,000 (depending on organizational size) for two years.

### **Capital Construction Support:**

- Capital grants for preservation and new construction of affordable, multifamily rental housing: We expect most of these grants to range from \$150,000 to \$250,000 for one to two years. Eligible uses include pre-development, construction, land, and building acquisition and rehab.

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## **WHO WE FUND**

*We seek to partner with organizations that:*

- Share our goals and vision for change
- Are committed to equity, diversity and inclusion in their organizations and partnerships
- Have a track record of effective work directly related to our funding priorities or have identified such work as a strategic and mission-aligned priority over the grant period
- Collaborate with other organizations in their community, within the same sector and/ or across sectors
- Recognize the intersection between their organization's work and broader policies and systems

- Have effective leadership that engages a base of community support
- Demonstrate the administrative capacity, financial plan and organizational commitment to implement their proposed project
- Are committed to understanding and evaluating the impact and effectiveness of their work

For more information, including Meyer’s basic eligibility criteria, please visit [www.mmt.org/apply/who-we-fund](http://www.mmt.org/apply/who-we-fund). Organizations that received a multi-year grant through Meyer's 2016 Spring Funding Opportunity are not eligible to apply for a 2017 Funding Opportunity grant through the 2017 Annual Funding Opportunity except in specific cases. For more information, please see the **Eligibility and Alignment** section at [www.mmt.org/apply/applicant-resources](http://www.mmt.org/apply/applicant-resources).

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## APPLICATION PROCESS

Meyer uses a two-step application process for our annual funding opportunity.

Inquiry Applications are welcome from any eligible organization seeking to advance one of the portfolio’s goals. A preview of the Inquiry Application questions appears below or available for download as a Word document at

[http://www.mmt.org/sites/default/files/inline-files/Housing\\_Opportunities\\_InquiryApp\\_Word\\_1.docx](http://www.mmt.org/sites/default/files/inline-files/Housing_Opportunities_InquiryApp_Word_1.docx).

After reviewing Inquiry Applications, we will invite the most promising applicants to submit a full proposal. A preview of the full proposal questions is available for download as a Word document at [www.mmt.org/sites/default/files/inline-files/Housing\\_Opportunities\\_FullProposal\\_Word\\_0.docx](http://www.mmt.org/sites/default/files/inline-files/Housing_Opportunities_FullProposal_Word_0.docx).

Applicants should:

- Create or update their profile in GrantIS, Meyer’s online application portal. The activation process can take several days, so please be sure to set up your account well in advance of the application deadline.
  - ◆ New GrantIS users, please visit: <https://grantis.mmt.org/questionnaire> to create an account.
  - ◆ Applicants with existing GrantIS accounts, please visit <https://grantis.mmt.org/> and check that your organization’s information (e.g., mailing address, Board members, etc.) is up to date.
- Submit their Inquiry Application no later than 5pm on Wednesday, April 19.

Meyer will notify organizations in mid-June whether or not they are invited to submit a full proposal. If

invited, organizations will have three weeks to do so.

After reviewing proposals and following up either in person or over the phone, we anticipate making final award decisions by the end of 2017, with funding available to organizations in early 2018.

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## CORE FUNDING GOALS + OUTCOMES

*Download a list of the awards granted for this portfolio's 2016 funding opportunity, arranged by goal, at [www.mmt.org/sites/default/files/inline-files/2016-Housing-Opportunities-Awards-by-Goal.pdf](http://www.mmt.org/sites/default/files/inline-files/2016-Housing-Opportunities-Awards-by-Goal.pdf)*

### **GOAL 1: PRESERVE + INCREASE THE NUMBER OF AFFORDABLE HOUSING RENTAL UNITS**

At a very basic level, we simply need more housing, especially more affordable housing. Meyer recognizes that affordable housing is basic social infrastructure — as a community grows it needs more affordable housing, just as it needs more parks, schools, and higher capacity for sewer, water and transportation systems.

The market simply cannot deliver housing that's affordable to those with very low incomes. Even for those with steady work, affordable housing is becoming more elusive in Oregon communities as rents rise dramatically in some parts of the state. Population growth, wage stagnation, high construction costs and historically low vacancy rates have all contributed to a chronic shortage of affordable housing.

Communities of color, rural underserved communities and other historically marginalized populations are disproportionately impacted by this ongoing crisis. We are committed to preserving and increasing the number of affordable rental housing units in Oregon.

#### Intended Outcomes

- **New Units:** Increased number of affordable rental housing units.
- **Preservation:** Strengthened long-term physical and financial viability of existing affordable housing units.

#### Examples of What We Might Fund

Taken as a whole, we aim to invest capital grants in a range of acquisition and rehabilitation, preservation and new construction projects across the state. This includes rural projects, projects in high-opportunity urban areas and transit-oriented development. In addition to targeting housing that serves residents with incomes at or below 60 percent MFI, we will prioritize projects that meet the needs of historically marginalized and under-resourced populations, including communities of color, underserved rural communities and people with disabilities or other special

needs. We will also give preference to rental housing units with public rent subsidies.

*These are only examples to illustrate the types of projects we might fund. We invite other ideas that would further our goals and intended outcomes.*

## **GOAL 2: SUPPORT THE HOUSING STABILITY + SUCCESS OF OREGONIANS LIVING ON LOW INCOMES**

Affordable housing gives people the stability to meet their basic needs and the opportunity to build better lives. But many Oregon households face barriers in accessing available housing, retaining their housing and achieving their goals for advancement. We aim to fund interventions and supports that help low-income households to build a better life for themselves on a foundation of stable housing.

### Intended Outcomes

- **Access:** Increased access to available housing for Oregonians living on low incomes
- **Retention:** Improved housing stability and retention for Oregonians living on low incomes
- **Advancement:** Increased opportunities for Oregonians living on low incomes to build the resources and skills necessary to advance toward their housing goals.
- **Mitigating Displacement:** Increased opportunities for renters and homeowners affected by displacement to remain in their existing homes or communities

### Examples of What We Might Fund

Housing stability and success may look different in various communities and we expect to fund a range of approaches that address the needs of specific communities and align with our equity lens. Examples include support for harder-to-house populations to find available housing and navigate the application process; wrap-around services for special needs populations; services and linkages to help residents achieve housing stability; and innovative strategies to help low-income renters and homeowners stay in their homes and communities. In addition to supporting individual resident needs, we seek approaches that help address housing disparities at the neighborhood and community levels, as well as systems-level projects that align and coordinate housing with other major systems of care.

*These are only examples to illustrate the types of projects we might fund. We invite other ideas that would further our goals and intended outcomes.*

**GOAL 3: STRENGTHEN THE HOUSING SECTOR BY BUILDING CAPACITY, DIVERSITY, EQUITY AND INCLUSION, AND COLLABORATION**

We aim to support the strength, effectiveness and long-term health of key organizations, collaboratives and networks involved in advancing our Housing Opportunities goals. Strengthening the housing sector will require a variety of investments in organizational capacity, housing portfolio health, strategic partnerships, collaboration and coordination and increased diversity, equity and inclusion.

*Intended Outcomes*

- **Organizational Capacity:** Strengthened skills and capacity of affordable housing organizations contribute to increased effectiveness, efficiency and long-term health
  
- **Network and Collaborative Capacity:** Increased coordination and alignment among a broad range of organizations and systems that impact residents’ lives and lead to better outcomes
  
- **Equity Focus:** Increased equity commitment among affordable housing organizations and improved understanding of how to advance diversity, equity and inclusion through their work

*Examples of What We Might Fund*

We expect to fund both individual capacity building efforts as well as collaborative efforts. Priority will be given to projects with a strong equity focus. Examples include planning grants to help multi-sector partners to align their services to better support residents, technical assistance to help an organization develop and operationalize an equity frame for its work, and support to increase the capacity of housing organizations in underserved rural areas so that they can more effectively compete for available capital resources.

*These are only examples to illustrate the types of projects we might fund. We invite other ideas that would further our goals and intended outcomes.*

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## **INQUIRY APPLICATION PREVIEW**

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 link to collab info) 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) 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 and Inclusion Resources 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	<input type="checkbox"/>
Low income people	<input type="checkbox"/>
Indigenous communities and tribes	<input type="checkbox"/>
Immigrants and refugees	<input type="checkbox"/>
Lesbian, gay, bisexual, transgender or other sexual minorities	<input type="checkbox"/>
People with disabilities	<input type="checkbox"/>
Women or girls	<input type="checkbox"/>
Aging/ elderly	<input type="checkbox"/>
Crime/ abuse survivors	<input type="checkbox"/>

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)to calculate this information.

% board that are people of color		<input type="checkbox"/>	Insufficient data available to answer this question
% staff that are people of color		<input type="checkbox"/>	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)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 Demographic Data 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data for staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data for population served	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**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.

<b>Fiscal Year</b>	<b>Total Revenue</b>	<b>Total Expenses</b>	<b>Surplus/Deficit</b>
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

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.

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## QUESTIONS?

- Read a list of frequently asked questions at [www.mmt.org/apply/applicant-resources/your-questions](http://www.mmt.org/apply/applicant-resources/your-questions)
- Participate in one of our community information sessions. Go to [www.mmt.org/events](http://www.mmt.org/events).
- Contact us at [questions@mmt.org](mailto:questions@mmt.org) or 503-228-5512 or contact a Housing Opportunities team member directly with questions about this funding opportunity
- Contact us at [grantsadmin@mmt.org](mailto:grantsadmin@mmt.org) with questions about GrantIS