

June 11, 2026

10 am - 12 pm

Community Investments

2027 Grant Cycle Announcement Webinar



SERVING HUMANITY TO HONOR GOD

We're
broadening
the
definition of
health care.



- Captions
- Record
- Breakout Rooms
- Polls
- Q&A
- Interpretation
- Settings
- Livestream
- Stop Incoming Video
- Reset to default



Alfred Chavira

We're
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health care.



Captions

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3

Alfred Chavira

Welcome

CHARITO LINCOLN

Vice President of Community Investments



Agenda

- 01 Grant Cycle Details**
Timeline, focus areas, grant types, & application tracks
- 02 Theories of Change**
Alignment to your work & ours
- 03 Preparing Your Application**
Financials & Budget, Narrative, Goals & Metrics
- 04 Reporting Requirements**
Reporting for funded applications
- 05 Application Review & Timeline**
What we look for & the decision timeline
- 06 Resources**
Looking ahead to the 2027 grant cycle

MHM Grantmaking

MELANIE CALL

Community Investments Manager



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MHM Commitment to Health Equity

Methodist Healthcare Ministries of South Texas, Inc. believes that to improve the wellness of the least served and fully live out its mission of “Serving Humanity to Honor God,” it must recognize the inequities inherent in its communities that contribute to poor health outcomes. **Health Equity is both the process and goal** by which Methodist Healthcare Ministries seeks to carry out that purpose.



Health Equity is a framework of thought and action that strives to reduce racial and socio-economic disparities and create fair and just opportunity for every person to reach their full potential for health and life and contribute to that of others.



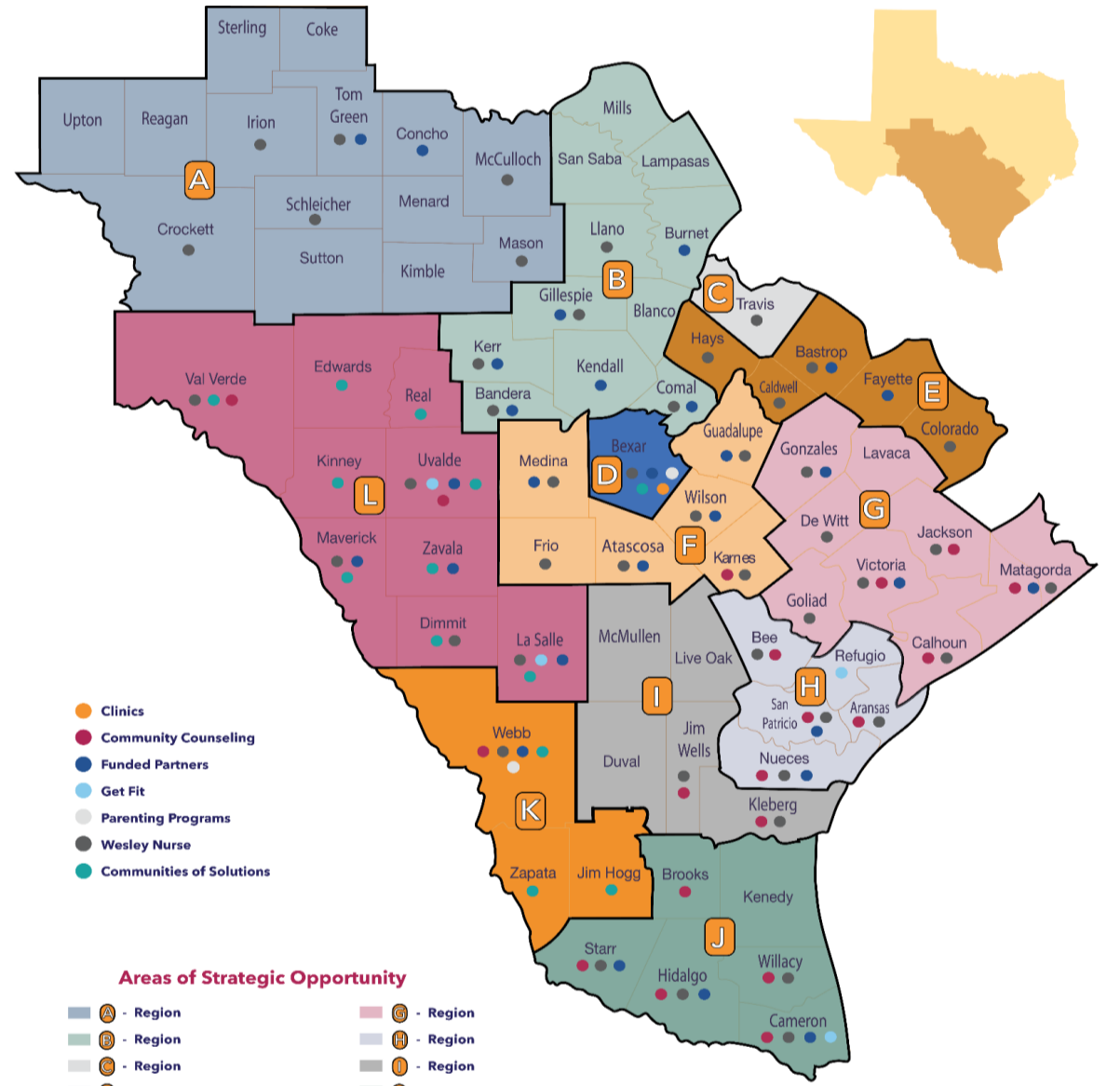
SERVING HUMANITY TO HONOR GOD

We're broadening the definition
of health care.™

FUNDING PHILOSOPHY STATEMENT

Our mission of "Serving Humanity to Honor God" calls us to do all we can to enhance well-being of the people and places in our service area so health equity is achievable, and *ALL* can thrive. Since our inception, Methodist Healthcare Ministries has believed that caring for health means caring for the whole person, and we recognize and affirm that health begins in community. We reinvest and steward our resources to work alongside the people in the places we serve, promoting lifelong well-being in body, mind, and spirit. We advance our mission through innovative and transformative approaches designed to address root causes and shift power through engaging in co-creation, influencing systems change, and strengthening communities.

MHM Service Area



- Clinics
- Community Counseling
- Funded Partners
- Get Fit
- Parenting Programs
- Wesley Nurse
- Communities of Solutions

- Areas of Strategic Opportunity**
- Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - South Texas
 - Tri-County
 - Mid-Border Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region
 - Region

Area of Strategic Opportunity will be named by the community and updated accordingly.

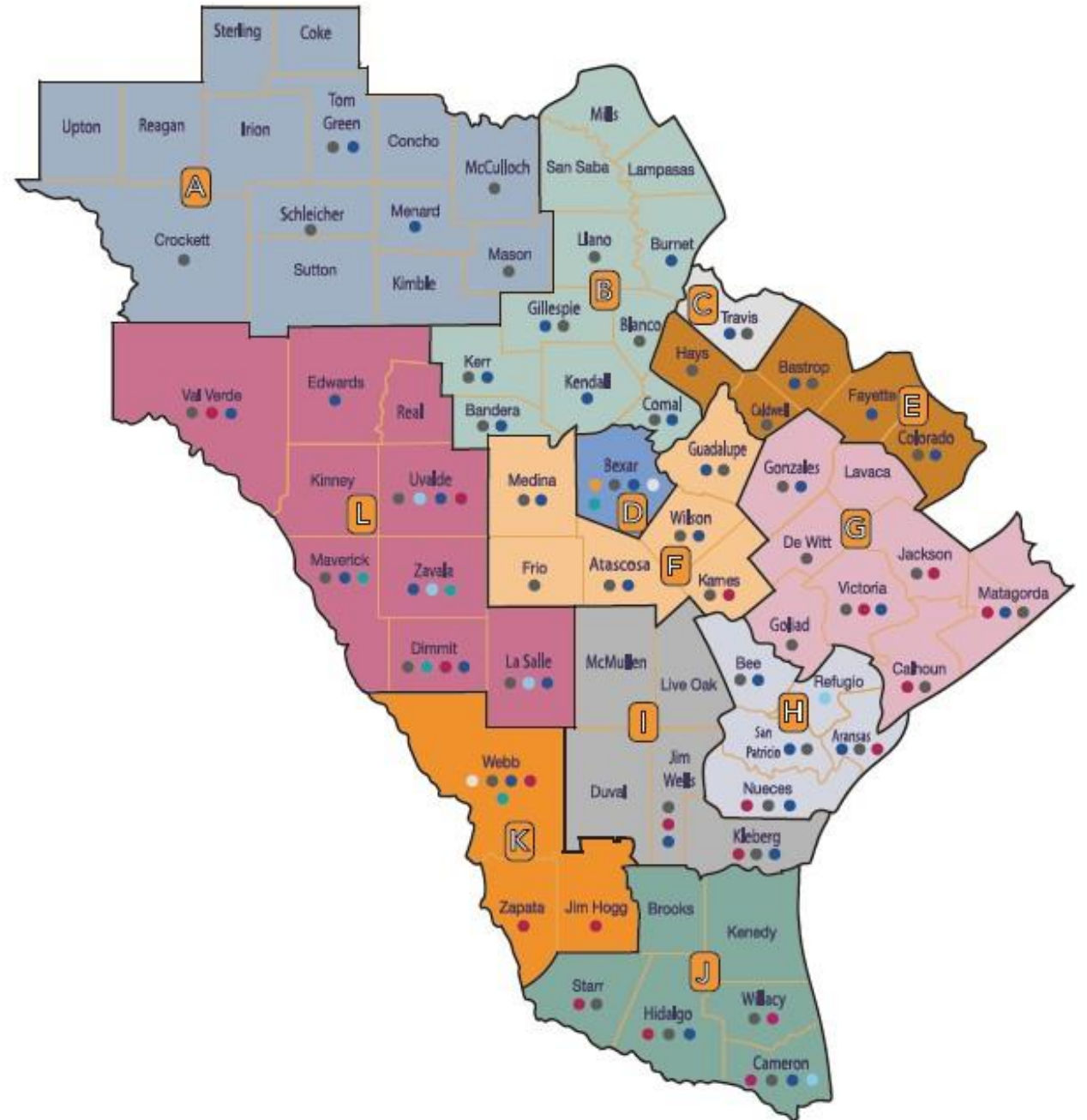


2027 Grant Cycle

COMMUNITY INVESTMENTS

Poll Question

What county
are you joining
us from?



Grants at a Glance

5 Focus Areas

Access to Care: General | Access to Care: Mental & Behavioral Health
Digital Equity | Food Security | Economic Mobility

Select one focus area for your application

3 Grant Types

Project/Program | Capital | General Operating

Select one grant type for your application

Application Tracks

Open Cycle-Standard | Open Cycle-Small Grants

Select one application track for your application

2027 Grant Cycle Timeline



Open Cycle Application Tracks

STANDARD GRANT

- Requests over \$100,000
- 74-county service area
- MHM Budget Template for Program & Capital Requests
- Mid-Year & Year-End Reports

SMALL GRANTS

- Requests \$20,000 - \$100,000
- Organizations with a budget up to \$1M
- Serving Rural Counties, or Zones J, K, & L
- Organization's Budget Template
- Year-End Report only

Requested amount may not exceed 20% of the organization's budget

Grant Types

General Operating

Unrestricted funding to support the mission of organizations that align to MHM priorities

Project/ Program

Support to establish or sustain a new, existing, or expanded project/program.


Capital

Support for facilities or infrastructure projects. No program/project or capacity building expenses.

Grant Types – General Operating

Standard Grant Criteria

Eligibility

- Meets requirements for MHM grant funding
- Organization’s **mission** and purpose address one or more of MHM’s focus area priorities
- Meets Financial Review Criteria for **Low-Risk** organization 
- Includes single year or multi-year grant request
- Organizations with **annual budget less than \$10M**
- 501c3 organizations only (excludes government entities, colleges, and universities)
- Active Board** of Directors
- At least **one paid staff** member

Stewardship

- Program Officer site visits
- Required progress toward goals aligned to MHM funding priorities

Financial Review Criteria

	<ul style="list-style-type: none"> Organization has an accounting system No significant deficiencies Considered a low-risk based on content of financial statements IRS 990 form completed annually and timely for the organization 	
Low Risk	2026 Grantee <ul style="list-style-type: none"> Generated annual financial statements Generated interim financial statements 3rd party audit conducted within past fiscal year 	New Applicant <ul style="list-style-type: none"> Generated two years of financial statements Generated interim financial statements 3rd party audit conducted for the past two fiscal years

Agenda






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Theories of Change

FOCUS AREA ALIGNMENT

Focus Area – Desired Future States

	Focus Area	Desired Future State
	Access to Care: Mental & Behavioral Health	All people in MHM’s service area have equitable access to holistic approaches to mental health care to achieve long term health
	Access to Care: General	All people in MHM’s service area have equitable access to holistic approaches to health care to optimize long term health
	Digital Equity	All people in MHM service region have access to reliable, affordable broadband service and the skills and opportunities to use this technology safely and effectively to support economic, health and social needs
	Food Security	All people in MHM’s service area have consistent access to sufficient food for a healthy life and to optimize long-term health
	Economic Mobility	Identify, invest in, and support approaches that address root causes of poverty and financial outcomes for individuals and families living in poverty.

Theories of Change

Objective 1

Increase Access to Services to achieve desired future state

PRIORITIES

1. Sustain rural M&BH services and programs
2. Support for providers and trauma informed care
3. Sustain supervisory and licensure placement sites

Objective 2

Improve Community Mental Health to achieve desired future state

PRIORITIES

1. Sustain evidence-based models
2. Sustain support for treating substance use disorder
3. Support crisis receiving and stabilization

Objective 3


Increase Youth Serving Mental Health Programs to achieve desired future

PRIORITIES

1. Sustain School-Based M&BH Programs
2. Sustain community M&BH support

Theory of Change: a conceptual model delivered as a concrete product to help strengthen strategies and maximize results by charting out the work ahead, what success looks like and how to get there.

- Adapted from *The Annie E. Casey Foundation, Developing a Theory of Change.*



Access to Care – Mental & Behavioral Health COMMUNITY INVESTMENTS THEORY OF CHANGE

Commitment to Health Equity

Methodist Healthcare Ministries of South Texas, Inc. believes that to improve the wellness of the least served and fully live out its mission of “Serving Humanity to Honor God,” it must recognize the inequities inherent in its communities that contribute to poor health outcomes. **Health Equity is both the process and goal by which Methodist Healthcare Ministries seeks to carry out that purpose.** Health Equity is a framework of thought and action that strives to reduce racial and socio-economic disparities and create fair and just opportunities for every person to reach their full potential.

Current State


- In 2023, 36.8% of adults in Texas reported symptoms of anxiety and/or depressive disorder, compared to 32.3% of adults in the U.S.
- More than 80 percent of Texas counties are designated as Mental Health Professional Shortage Areas, with a majority being rural counties
- 61% of adult Texans who needed mental health treatment did not receive it, with 45.3% not seeking help due to cost
- 15,072,179 million people in Texas live in a community that does not have enough mental health professionals
- In 2024, suicide was the second leading cause of death among adolescents (ages 15-24) across the U.S.
- In 2023, more than 4 in 10 (42%) students felt persistently sad or hopeless and nearly one-third (29%) experienced poor mental health
- 26.52% of individuals living within MHM’s 74-County Region live alone

Desired Future State

All people in MHM’s service area have equitable access to holistic approaches to mental health care to achieve long term health

Vision

To be the leader for improving wellness of the least served

Objective 1

Increase Access to Services to achieve desired future state

PRIORITIES

1. Sustain rural M&BH services and programs
2. Support for providers and trauma informed care
3. Sustain supervisory and licensure placement sites

Objective 2

Improve Community Mental Health to achieve desired future state

PRIORITIES

1. Sustain evidence-based models
2. Sustain support for treating substance use disorder
3. Support crisis receiving and stabilization

Objective 3

Increase Youth Serving Mental Health Programs to achieve desired future

PRIORITIES

1. Sustain School-Based M&BH Programs
2. Sustain community M&BH support

*MHM investments prioritize efforts serving economically disadvantaged, geographically underserved, and historically disenfranchised populations

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Grantee Portal

The screenshot displays the Grantee Portal interface. On the left is a dark sidebar with a navigation menu. The top of the sidebar features the Methodist Healthcare Ministries logo and the tagline "SERVING HUMANITY TO HONOR GOD". Below the logo is a search bar labeled "Test Org Legal Name". The navigation menu includes categories like INFORMATION, ORGANIZATIONS (1), CONTACT (1), APPLICATIONS (8), and GRANTS (2), with sub-items such as "Grant Opportunities" and "Start Small Grant Application Here" highlighted by an orange arrow. The main content area is titled "2027 Annual Grant Cycle" and contains text about application tracks, a deadline of July 24, 2026, and two buttons: "Start Small Grant Application Here" and "Start Standard Application Here", both circled in orange.

2027 Annual Grant Cycle

Methodist Healthcare Ministries (MHM) offers two application tracks for the 2027 Open Grant Cycle: Standard and Small Grants Tracks. Both tracks support Project/Program, Capital, and General Operating Support requests.

A downloadable preview copy of each application is available below. These preview documents are provided for planning purposes only and allow applicants to review application questions and required attachments before accessing an online application form.

Organizations may submit only one application under either the Small Grants or Standard Track.

Before You Apply

We strongly encourage all applicants to review the 2027 Open Cycle Grant Guidelines for eligibility requirements before beginning an application.

Deadline To Apply: July 24, 2026, at 5 p.m. (CST)

Small Grants Track
Designed for organizations with an annual organizational budget of \$1 million or less. Proposals must request one year of funding in an amount between \$20,000 and \$100,000 and serve MHM's designated rural counties or Areas of Strategic Opportunity J, K, and L.

Preview the Small Grant Application:
[Download Small Grant Application Preview](#)

Click the link below to start your Small Grant Application.

[Start Small Grant Application Here](#)

Standard Grant Track
Designed for organizations requesting more than \$100,000 in funding and serving eligible communities within MHM's 74-county service area. Proposals may request either one year or three years of funding. Additional requirements apply to multi-year and general operating support requests; please review the Grant Guidelines for more information.

Preview the Standard Grant Application:
[Download Standard Grant Application Preview](#)

Click the link below to start your Standard application.

[Start Standard Application Here](#)

Current Users:

- Sign-in using your current credentials
- Use "Forgot Password" to reset your password

New Users:

- Use the link on the 2027 Grant Guidelines page to complete the Eligibility Quiz
- Then, complete and submit the registration form
- MHM staff review & approve the registration form, which **may take up to 3 days**
- You will receive login instructions via email, once approved
- Log in to the Grantee Portal and navigate to **Grant Opportunities**
- System preferred browsers: Chrome, Firefox, or Safari



Preparing your Application

**FINANCIAL ATTACHMENTS
& REQUEST BUDGET**

Financial Reports Attachments Checklist

Current 2026 Grantees

- A. **Organization's Annual Budget** - Most Recent Board Approved budget that illustrates both Revenues & Expenditures
- B. **Fiscal Year-End Financial Statements** - Full 12 Months
 - 1 Statement of Financial Position and
 - 1 Statement of Activities
- C. **Current Year to Date Financial Statements** - At Least 6 Months
 - 1 Statement of Financial Position and
 - 1 Statement of Activities
- D. **Most Recent Audit Report** - Within the Past 2 Years, if available
- E. **Government Grant Audit Report** - Most Recent, if available

New Applicants

- A. **Organization's Annual Budget** - Most Recent Board Approved budget that illustrates both Revenues & Expenditures
- B. **Fiscal Year-End Financial Statements** - 2 Full 12 Month Periods
 - 2 Statements of Financial Position and
 - 2 Statements of Activities
- C. **Current Year to Date Financial Statements** - At Least 6 Months
 - 1 Statement of Financial Position and
 - 1 Statement of Activities
- D. **Two Most Recent Audits** - Within the Past 3 Years, if available
- E. **Government Grant Audit Report** - Most Recent, if available

Financial Reports & Timelines

- A) **Statement of Financial Position** (SOFP) - a.k.a. Balance Sheet
- B) **Statement of Activities** (SOA) - a.k.a. Income Statement or Profit & Loss
- C) **Run each financial report above across the corresponding & required time periods**

Current 2026 Grantees – A Total of 4 Financial Reports

Calendar Year

Time Period - One complete 12-month period plus the most recent 6-months

Fiscal Year-End (FYE) Financial Statement - Covering the full fiscal year

1	2	3	4	5	6	7	8	9	10	11	12	
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	2025
1/1/2025			thru						12/31/2025			

Current Year to Date (YTD) Financial Statement - At least 6 months

1	2	3	4	5	6	
Jan	Feb	Mar	Apr	May	Jun	2026
1/1/2026		thru			6/30/2026	

Financial Reports & Timelines

Current 2026 Grantees – A Total of 4 Financial Reports

Calendar Year

A) **2 Reports - Statement of Financial Position** (SOFP) - a.k.a. Balance Sheet

- 1) Statement of Financial Position for January 2025 – December 2025
- 2) Statement of Financial Position for January 2026 – June 2026

B) **2 Reports - Statement of Activities** (SOA) - a.k.a. Income Statement or Profit & Loss

- 3) Statement of Activities for January 2025 – December 2025
- 4) Statement of Activities for January 2026 – June 2026

Financial Reports & Timelines

Current 2026 Grantees – A Total of 4 Financial Reports **Example of a Fiscal Year**

Time Period - One complete 12-month period plus at least 6 months from the current year

Fiscal Year-End (FYE) Financial Statement - Covering the full fiscal year

	1	2	3	4	5	6	7	8	9	10	11	12	
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	24-25
9/1/2024				thru								8/31/2025	

Current Year to Date (YTD) Financial Statement - At least 6 months

	1	2	3	4	5	6	7	8	9	10	
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	25-26
9/1/2025				thru						6/30/2026	

Financial Reports & Timelines

Current 2026 Grantees – A Total of 4 Financial Reports

Example of a Fiscal Year

A) **2 Reports - Statement of Financial Position** (SOFP) - a.k.a. Balance Sheet

- 1) Statement of Financial Position for September 2024 – August 2025
- 2) Statement of Financial Position for September 2025 – June 2026

B) **2 Reports - Statement of Activities** (SOA) - a.k.a. Income Statement or Profit & Loss

- 3) Statement of Activities for September 2024 – August 2025
- 4) Statement of Activities for September 2025 – June 2026

Financial Reports & Timelines

New Applicants – A Total of 6 Financial Reports

Calendar Year

Time Period - Two complete 12-month periods plus the most recent 6 months

Fiscal Year-End (FYE) Financial Statement - Covering the full calendar year

1	2	3	4	5	6	7	8	9	10	11	12		
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	2024	
1/1/2024												thru	12/31/2024

1	2	3	4	5	6	7	8	9	10	11	12		
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	2025	
1/1/2025												thru	12/31/2025

Current Year to Date (YTD) Financial Statement - At least 6 months

1	2	3	4	5	6							
Jan	Feb	Mar	Apr	May	Jun							2026
1/1/2026						thru	6/30/2026					

Financial Reports & Timelines

New Applicants – A Total of 6 Financial Reports

Calendar Year

- A) **3 Reports - Statement of Financial Position** (SOFP) - a.k.a. Balance Sheet
 - 1) Statement of Financial Position for January 2024 - December 2024
 - 2) Statement of Financial Position for January 2025 - December 2025
 - 3) Statement of Financial Position for January 2026 - June 2026

- B) **3 Reports - Statement of Activities** (SOA) - a.k.a. Income Statement or Profit & Loss
 - 4) Statement of Activities for January 2024 - December 2024
 - 5) Statement of Activities for January 2025 - December 2025
 - 6) Statement of Activities for January 2026 - June 2026

Financial Reports & Timelines

New Applicants – A Total of 6 Financial Reports **Example of a Fiscal Year**

Time Period - Two complete 12-month periods plus the most recent 6 months

Fiscal Year-End (FYE) Financial Statement - Covering the full fiscal year

1	2	3	4	5	6	7	8	9	10	11	12
Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
9/1/2023 thru 8/31/2024											

23-24

1	2	3	4	5	6	7	8	9	10	11	12
Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
9/1/2024 thru 8/31/2025											

24-25

Current Year to Date (YTD) Financial Statement - At least 6 months

1	2	3	4	5	6	7	8	9	10
Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
9/1/2025 thru 6/30/2026									

25-26

Financial Reports & Timelines

New Applicants – A Total of 6 Financial Reports

Example of a Fiscal Year

- A) **3 Reports - Statement of Financial Position** (SOFP) - a.k.a. Balance Sheet
 - 1) Statement of Financial Position for September 2023 – August 2024
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- B) **3 Reports - Statement of Activities** (SOA) - a.k.a. Income Statement or Profit & Loss
 - 4) Statement of Activities for September 2023 – August 2024
 - 5) Statement of Activities for September 2024 – August 2025
 - 6) Statement of Activities for September 2025 – June 2026

Organization's Annual Budget

The Organization's Annual Budget must be the most recent Board approved budget.

The Organization's Annual Budget will appear in **3 sections**.

1. An upload in the grant application.
2. An amount entered in the grant application.
3. An amount entered in the Budget Template.

The amounts must be the same in all 3 sections of the application.

MHM does not fund over 20% of the organization's annual budget.

2027 Budget Template

Single-Year and Multi-Year Budget Templates

- Multi-Year only available to 2026 Community Investment Grantees

Budget template consists of:

- Instructions
- Sample budget
- Blank template to enter budget information.
- Summary of three-year period (Multi-Year template only)

Only MHM's budget template will be accepted.

Program Budget - Heading

Organization Name:	Methodist Healthcare Ministries	
Project Title:	Going the Extra Mile	
	Start Date:	End Date:
Grant Period:	1/1/2027	12/31/2027
Amount Requested:	\$450,000	
Payment Schedule:	Monthly	
	Quarterly	
	Biannual (for requests \$100k and below)	
	Annual (for requests \$100k and below)	

Program Budget – Revenue

Sections can be blank if there are no other sources of revenue for the program.

Sources	
MHM Request:	\$ -
	Total
Contributed	
	\$ -
	\$ -
	\$ -
Subtotal	\$ -
Government:	
	\$ -
	\$ -
	\$ -
Subtotal	\$ -
Foundation Grants:	
	\$ -
	\$ -
	\$ -
Subtotal	\$ -
Program Fees:	
	\$ -
	\$ -
	\$ -
Subtotal	\$ -

← Auto populated from Heading.

← Amount org is contributing to the program.

← Government Grants being used for the program.

← Foundation grants being used for the program.

← Program fees contributing to revenue.

Program Budget – Revenue cont'd

Sections can be blank if there are no other sources of revenue for the program.

<u>Donations:</u>			
		\$	-
		\$	-
		\$	-
	Subtotal	\$	-
<u>Special Events/Fundraising:</u>			
		\$	-
		\$	-
		\$	-
	Subtotal	\$	-
<u>In Kind:</u>			
		\$	-
		\$	-
		\$	-
	Subtotal	\$	-
<u>Other:</u>			
		\$	-
		\$	-
		\$	-
	Subtotal	\$	-
	Total Program Revenue	\$	-

A formula to add all revenue. No input required.

Monetary donations used as funding for the program.

Specific events used to generate revenue for funding for the program.

Nonmonetary revenue (e.g., Volunteer time) used for the program Must be offset by in kind expense.

Any other revenue source not captured above.

Program Budget – Expenses

- Enter in unshaded and yellow areas only. Gray boxes are formulas and do not require input.
- Enter position title, total salary amount, and the percent of time spent on the MHM grant.
- Enter total amount of fringe benefits in yellow box. This is a total of all positions listed.

Program Expenses				
Description	Total Program Salaries/Fringe Benefits	% of time spent on MHM Grant	MHM Request	Other Funding Sources
Salaries & Wages/Fringe Benefits (enter position title):				
Program Manager	\$ 100,000	50%	\$ 50,000	\$ 50,000
Community Health Worker	\$ 85,000	75%	\$ 63,750	\$ 21,250
RN	\$ 150,000	50%	\$ 75,000	\$ 75,000
			\$ -	\$ -
			\$ -	\$ -
			\$ -	\$ -
			\$ -	\$ -
			\$ -	\$ -
Total Salaries & Wages	\$ 335,000		\$ 188,750	\$ 146,250
Fringe Benefits (for allocated salaries only)	\$ 33,750		\$ 33,750	
Total Fringe Benefits as a % of Salaries & Wages			18%	
Total Salaries & Fringe Benefits	\$ 368,750		\$ 222,500	\$ 146,250

Program Budget – Expenses

- Enter in unshaded only. Gray boxes are formulas and do not require input.
- Enter all program expenses necessary to carry out the program.
- Enter the percent of expenses funded by the MHM grant.

	Total Program Other Expenses	% of expense funded by MHM Grant	MHM Request	Other Funding Sources
<u>Program Expenses:</u>				
Lab & Diagnostic Test	\$ 150,000	50%	\$ 75,000	\$ 75,000
Contract Labor	\$ 75,000	100%	\$ 75,000	\$ -
Office Supplies	\$ 20,000	50%	\$ 10,000	\$ 10,000
Rent	\$ 5,000	0%	\$ -	\$ 5,000
EHR Software	\$ 22,000	50%	\$ 11,000	\$ 11,000
Computers	\$ 21,000	100%	\$ 21,000	\$ -
Indirect Cost*			\$ -	\$ -
* Indirect Costs may be included up to 15% of direct expenses. Indirect cost may not be allowable on computers, software, and other capital items. See Indirect Cost guidelines for more information.				
	\$ 35,500	100%	\$ 35,500	\$ -
Total Program Expenses	\$ 328,500		\$ 227,500	\$ 101,000
Total Personnel & Program Expenses	\$ 697,250		\$ 450,000	\$ 247,250

Program Budget – Summary of Financial Request

- Summary of Financial Request is found at the bottom of the budget form.

It displays:

- Amount requested from MHM
- Program Net Income
- Requested amount as a percentage of total cost of the program
- Requested amount as a percent of organizational budget

Summary of Financial Request	
Total MHM Request	\$ 450,000
Program Net Income	\$ -
MHM Funding of Program Percentage	65%
Total Organizational Operating budget	\$ 5,000,000
% of org budget funded by MHM	9%

Program Budget – Summary of Financial Request cont'd

Summary of Financial Request	
Total MHM Request	\$ 450,000
Program Net Income	\$ -
MHM Funding of Program Percentage	65%
Total Organizational Operating budget	\$ 5,000,000
% of org budget funded by MHM	9%

	Total Program Other Expenses	% of expense funded by MHM Grant	MHM Request	Other Funding Sources
Program Expenses:				
Lab & Diagnostic Test	\$ 150,000	50%	\$ 75,000	\$ 75,000
Contract Labor	\$ 75,000	100%	\$ 75,000	\$ -
Office Supplies	\$ 20,000	50%	\$ 10,000	\$ 10,000
Rent	\$ 5,000	0%	\$ -	\$ 5,000
EHR Software	\$ 22,000	50%	\$ 11,000	\$ 11,000
Computers	\$ 21,000	100%	\$ 21,000	\$ -
Indirect Cost*			\$ -	\$ -
* Indirect Costs may be included up to 15% of direct expenses. Indirect cost may not be allowable on computers, software, and other capital items. See Indirect Cost guidelines for more information.				
	\$ 35,500	100%	\$ 35,500	\$ -
Total Program Expenses	\$ 328,500		\$ 227,500	\$ 101,000
Total Personnel & Program Expenses	\$ 697,250		\$ 450,000	\$ 247,250

The budgeted expenses must balance to the MHM request.

An error message will appear if the amounts do not match.

Program Budget – Summary of Financial Request cont'd

Summary of Financial Request	
Total MHM Request	\$ 450,000
Program Net Income	\$ -
MHM Funding of Program Percentage	65%
Total Organizational Operating budget	\$ 5,000,000
% of org budget funded by MHM	9%

Enter organizational budget in yellow box. Gray boxes are formulas and do not require input.

MHM does not fund over 20% of the organization's annual budget.

Program Budget – Justification Examples

- Enter justification for each position listed on the personnel section of the budget.
- Enter justification for each program expense and include detail such as quantity, rates, duration, unit costs, and number of units as applicable.

Justification

Please provide an explanation of the proposed expense.

The Program Manager will work half the time on the MHM grant to be sure the program goals are met.
The Community Health Worker will visit clients on a weekly basis.
The RN will review patient data with the patient.

The medical staff will perform lab tests and funds are needed to get results. 2,000 lab tests at \$75/each.
A consultant will help with the organizations strategic plan. The budget is for 8 months of work at \$9,375/month.
Office supplies are needed for general work at \$2,000/mo for 10 months.
Rent is provided as an in-kind expense.
We are in need of a new software to keep track of patient data.

New computers are needed for office and field staff. 15 computers will be purchased at \$1,400/each.

The budget is considered incomplete if the justifications section is not filled out.

Indirect Cost Guidelines

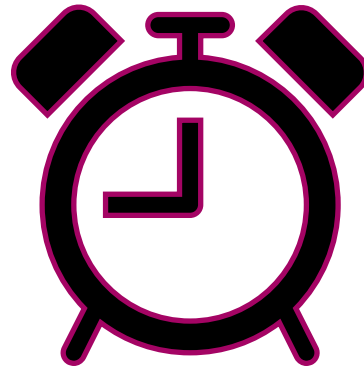
Indirect costs are:

- Allowed to be included in a grant at a maximum rate of 15% of the direct costs.
- Allowed to be included for universities/colleges up to 10% of direct costs.
- Not allowed for government agencies or municipalities.
- Not allowed for General Operating grants.
- Only allowed to be included at time of application.
- Not allowed for capital expenses, equipment purchases, or bulk purchases of computers.
- Indirect cost rate should be applied to actual direct costs incurred during the grant period.
- See MHM indirect costs guidelines for more information.

MHM Does Not Fund:

- Endowments
- Financial deficits or debt reduction
- Fundraising events
- Individuals' requests for Grants or Scholarships
- Insurance (unless for a capacity building or capital grant)
- Land
- Legal fees
- Lobbying on behalf of political candidates

Break
3 min



Agenda

- 01 Grant Cycle Details**
Timeline, focus areas, grant types, & application tracks
- 02 Theories of Change**
Alignment to your work & ours
- 03 Preparing Your Application**
Financials & Budget, Narrative, Goals & Metrics
- 04 Reporting Requirements**
Reporting for funded applications
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What we look for & the decision timeline
- 06 Resources**
Looking ahead to the 2027 grant cycle



Preparing your Application

**NARRATIVE QUESTIONS
& REQUEST INFORMATION**

Poll Question

**What focus
area do you
think you will
be applying
for?**



**Access to Care:
Mental & Behavioral Health**



**Access to Care:
General**



Digital Equity



Food Security



Economic Mobility

Open Cycle Applicants: What to Consider

Request Amount

- i. Typical grant size ranges from \$220-\$250,000
- ii. MHM does not fund more than 20% of the organization's budget

Funding Alignment & Eligibility

- i. Serve MHM's 74-County Region
 - i. New Bexar County applications: serving ONLY priority zip codes
- ii. Address Theory of Change Objectives and Priorities
- iii. Not including an ineligible request
- iv. Organization or fiscal sponsor tax exempt for at least one year

Multi-Year Grants

- i. Multi-year only available to 2026 funded partners
- ii. Organization and project plans over the next 3 years
- iii. Priority for requests serving rural areas or ASO zones J, K, or L and addressing root causes
- iv. Focus on Social Determinants of Health

Small Grants

- i. Org Budget under \$1M
- ii. Requests \$20k- \$100k
- iii. Serving rural areas or ASO zones J, K, or L

Organization and Request Information

Narrative Questions Overview

Organization Information



- **Summary:** brief overview, impact, collaboration
- **Focus Area:** select the primary focus area

Request Information



- **Request Description:** activities, staff, success at the end of the grant
- **Challenges Addressed:** needs or community gaps addressed by the grant
- **Timeline:** milestones
- **Focus Area:** select the primary focus area

Location and Population

Selection Questions Overview



Select the Grant Location

- Counties where applicant will use MHM funds
- List Bexar County zip codes served

Select the Populations

- Age Group
- Ethnicity
- Population Served (ex: individuals living in colonias, LGBTQ+, general/not specified)

Select the Location of Population Served by Grant

- Estimate of counties where participants come from
- Option for OTHER if unknown or not applicable



Preparing Your Application

GOALS AND METRICS

Evaluation Principles



Grantee-Driven Learning Goals

- Goals and Metrics must align to the:
 - Priority(ies) listed on one or more focus area Theory of Change
 - grant application purpose (project/program, capital, or GO)
 - proposed budget (if applicable)
- Each application will include a minimum of **two quantitative goals**.
 - Applicants can submit three additional goals that can be either quantitative or qualitative (maximum of 5 goals)

Goal: a broad statement describing the desired change or outcome a project intends to achieve

Metric: a specific, measurable value used to track progress toward a goal

Mixed-Methods Approach

A mixed-methods approach can support the collection and analysis of more varied types of data that provide comprehensive understanding and evidence of the impacts of interventions in communities.

Quantitative Methods collect and statistically analyze **numerical data** to identify patterns and test hypotheses. They provide opportunities for precise measurement.

Examples: number of patients served, pounds of food distributed, A1c and PHQ-9 improvements, number of devices distributed, growth in reading levels

Tools include surveys, baseline and end surveys, randomized controlled trials, and cost-benefit analysis

Qualitative Methods collect and analyze subjective experiences and attitudes through **non-numerical data** that can help explain the why, how, or what. They provide understanding of personal motivations and rich insights into complex topics.

Examples: testimonies of improved quality of life, participants in digital literacy training reporting the impact of teaching digital skills to loved one/family member

Tools include interviews, observations, document review, focus groups, and case studies

Adding Goals to Your Application

In the application, you will first copy and paste a priority from a Theory of Change, then you will write your goal and list your metric(s) as demonstrated by the example below.

Theory of Change: Access to Care - General

Priority: Provide outreach and education around healthy behavior

Goal: Within a **3-month period, 90% of people** attending the diabetes self-management classes will participate in experiential learning that promotes best practices for diabetes self-management by **exhibiting at least 4 of the following self-care behaviors:** personal blood glucose check; track carbohydrates; identify carbohydrates, proteins, and fats; participate in exercise; practice a stress relieving activity. Activities will be tracked through **participant logs** collected on a **weekly basis**.

Note: This goal includes SMART (specific, measurable, achievable, relevant, and time-bound) objectives, trackable metrics with targets, and plans for collecting data.

Optional: For additional guidance, see the "Goals and Metrics Applicant Handout"

Agenda

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Looking ahead to the 2027 grant cycle



Reporting Requirements

REPORTING YOUR SUCCESS

Reporting Requirements

Requirement	Standard Grants: Project/Program & Capital	Small Grants: All Types & Standard Grants: General Operating
<p>Narrative Report Updates on progress toward grant goals, challenges, successes, testimonials, grant highlights, etc.</p>	Mid-Year & Year-End	Year-End Only
<p>Financial Report Budget-to-actual report using the MHM template, with explanations for variances</p>	Mid-Year & Year-End	Year-End Only
<p>Site Visits In-person and virtual visits with Program Officer and other MHM staff</p>	By request	

- Review the grant agreement for reporting deadlines
- MHM may request the return of any unspent funds at the end of the grant period
- Reporting submitted through MHM's grantee portal

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Looking ahead to the 2027 grant cycle



Review Process

WHAT WE LOOK FOR

Our Considerations for Funding

 Collaboration	Partners who are active participants in local collective efforts and deeply engaged in their communities
 Community Perspectives	Partners and programs that incorporate Persons with Lived Experience
 Serving the Least Served	MHM's missional population - economically disadvantaged, geographically under-served, and historically disenfranchised populations.
 Systemic Change	Address the root causes of health inequities.

Scoring Rubric



1. Strategic Alignment
2. Program/Project Design
3. Evaluation
4. Community Impact
5. Scope of Challenge
6. Collaboration
7. Organizational Capacity

Decision Timeline

July	Applications due July 24th
August	Program Officer and internal Working Group review
October	Initial declinations
November	Award notifications
December	Grant agreements signed

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Resources

MHM STAFF AND WEBSITE



Community Investments & Grants Accounting Teams

Grantmaking

- ★ **Alfred Chavira**, Sr. Program Officer (bilingual, Eng./Sp.)
- ★ **Amparo Diaz**, Program Officer (bilingual, Eng./Sp.)
- ★ **Anaiza Rodriguez**, Community Initiatives Coordinator
- ★ **Ashley Ortiz**, Program Officer
- ★ **Charito Lincoln**, VP of Community Investments
- ★ **Chloé Laurence**, Capacity Building Specialist
- ★ **Cindy McCloy**, VP of Accounting & Controller
- ★ **David Rodriguez**, Sr. Grants Accountant
- ★ **Eliseo Ceja**, Digital Equity Coordinator (bilingual, Eng./Sp.)
- ★ **Irma Reyna**, Digital Equity Coordinator (bilingual, Eng./Sp.)
- ★ **Ismael Neri**, Program Associate (bilingual, Eng./Sp.)

Capacity Building

Community Initiatives

Grants Accounting

- ★ **Lindsay Morgan**, Sr. Capacity Building Specialist
- ★ **Madison Dillon**, Program Officer
- ★ **Marissa Mexquitic**, Program Officer
- ★ **Melanie Call**, Community Investments Manager
- ★ **Mina Luna**, Sr. Grants Accountant
- ★ **Monica Gonzalez**, Community Initiatives Manager
- ★ **Patty Barron**, Sr. Database Analyst
- ★ **Rachel O'Hern**, Sr. Program Officer
- ★ **Sandy Doughton**, Capacity Building Manager
- ★ **Venessa Medina**, Grants Accounting Manager



Applicant Support

Website: www.mhm.org/grantmaking

- Eligibility and Grant Guidelines
- Theories of Change
- Grant Resource Library
 - Application PDF
 - Budget Templates
 - Glossary of Terms
 - Rural County List
 - Frequently Asked Questions (FAQs)
 - Webinar PowerPoint Presentation
 - Recording of Webinar Presentation
- For fiscal sponsorship questions contact Community Investments

Email: CommInvestments@mhm.org



Additional Funding Opportunity

Economic Mobility Request for Proposals (RFP)

June	<ul style="list-style-type: none">▪ Application opens Mid-June▪ Informational Webinar: June 16th
July	<ul style="list-style-type: none">▪ Office Hours available for applicants
August	<ul style="list-style-type: none">▪ MHM reviews applications
September	<ul style="list-style-type: none">▪ Grants awarded/Grant Cycle Sept - Aug▪ 5-Year Grant Period

- Economic Mobility RFP has **specific eligibility criteria**, including serving MHM Areas J, K, L
- Organizations are eligible to apply for the Open Grant Cycle **and** the Economic Mobility RFP
- Email CommInvestments@mhm.org for more information

Questions & Answers



**Submit your questions in
the Q&A box.**

Thank you!

May the God of hope fill you with all
joy and peace in believing,
so that you may abound in hope
by the power of the Holy Spirit.

Amen.
Romans 15:13





"Do all the good you can, by all the means you can, in all the places you can, at all the times you can, to all the people you can, as long as ever you can."

Attributed to John Wesley