



2026 MHM Grantee Welcome Webinar

January 23, 2026
10:00 am – 12:00 pm



Welcome

CHARITO LINCOLN

VP of Community investments

Today's Agenda

2026 MHM Grantee Welcome Webinar

- Welcome and Introductions
- Agenda Review
- Grant Process Review
 - Payment Schedule
 - Site Visits
 - Grant Modifications
 - Financial Reporting
 - Branding Guidelines
 - **Breakout Rooms – Reporting Requirements**

BREAK

- Community Initiatives
- Capacity Building
- Policy & Advocacy
- Feedback and Resources

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.

The Grantee Perception Report (GPR) by the Center for Effective Philanthropy is the only grantee survey that puts results in a comparative context with peer funders.

Through an easy-to-implement, confidential online survey, funders learn from actionable insights based on truly candid and reliable grantee feedback.

Thank you for participating!

Grantee Perception Report



Grantees surveyed Sept. - Oct. 2025

- 163 invited, 115 responded (71% response rate)
- Previously surveyed grantees in 2019 and 2023

MHM in the top 10% of funders for:

- Providing support to meet an important organization/program need
 - 75% of respondents report participating in one form of assistance beyond the grant
- Approachability if problems arise and openness to ideas about strategy
- Clear, consistent, and transparent communications

Areas for Continued Growth

- Continued opportunities for grantee networking, such as peer convenings for peer learning or sharing of best practices
- More frequent touchpoints and informal check-ins with MHM staff
- Continued streamlining grantmaking processes, such as reporting

Teams

Grantmaking

Community Initiatives

Capacity Building

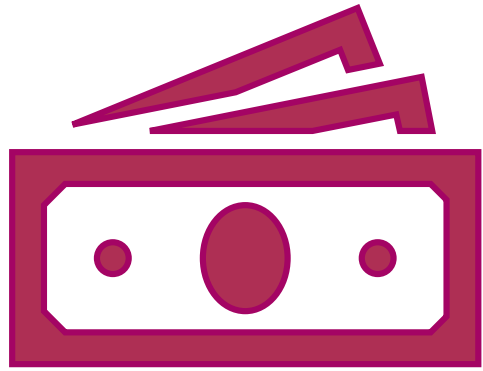
Operational Excellence

Community Investments Department

- ★ **Alfred Chavira**, Sr. Program Officer (bilingual, Eng./Sp.)
- ★ **Amparo Diaz**, Program Officer (bilingual, Eng./Sp.)
- ★ **Angelika Kluna**, Community Investments Operations Specialist
- ★ **Ashley Ortiz**, Program Officer
- ★ **Charito Lincoln**, Vice President
- ★ **Chloé Laurence**, Capacity Building Specialist
- ★ **Eliseo Ceja**, Digital Equity Coordinator (bilingual, Eng./Sp.)
- ★ **Ismael Neri**, Program Associate (bilingual, Eng./Sp.)
- ★ **Lindsay Morgan**, Sr. Capacity Building Specialist
- ★ **Madison Dillon**, Program Officer
- ★ **Marisa Gibson**, Community Investments Administrator
- ★ **Melanie Call**, Community Investments Manager
- ★ **Monica Gonzalez**, Community Initiatives Manager
- ★ **Patty Barron**, Sr. Database Analyst
- ★ **Rachel O'Hern**, Sr. Program Officer
- ★ **Sandy Doughton**, Capacity Building Manager



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2026 Grant Management

Grant Payment Schedule

Payment Schedule	Annual	Biannual	Quarterly	Monthly
Grant Awards over \$100,000	N/A	N/A	1st payment 25% of grant based on award amount April 25% of grant based on award amount July 25% of grant based on award amount October Up to 25% of grant based on mid-year reconciliation	January - September Even monthly grant payments based on award amount October - December Even monthly grant payments based on mid-year reconciliation
Grant Awards of / under \$100,000	Full grant award amount within 30 days of executed Grant Agreement	1st payment* 50% of grant based on award amount 2nd payment (September) Up to 50% of grant based on mid-year reconciliation**		

***Note:** 1st payment issued within 30 days of executed grant agreement

****Reconciliation:** Underspent funds at reporting time will be reduced from the following grant payments after reconciliation. At the end of the grant period, MHM may request any funds that remain unspent be returned to MHM.

MHM Does Not Fund:

- Endowments
- Financial deficits or debt reduction
- Fundraising events
- Grants or Scholarships to individuals
- Insurance (unless for a capacity building or capital grant)
- Land
- Legal fees
- Lobbying



Quick Q & A - Grant Payments -



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Site Visits

- **Scheduled annually**
- **Priority event?** Let your PO know!
- **Virtual or in-person**, based on preference/availability
- **Discussion to expect**
 - Program/budget & finance updates
 - Goals, challenges, referral partnerships
 - Tour, if applicable



Quick Q & A

- Site Visits -



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Grant Modifications

Budget

Criteria

- Change is more than \$20,000 of grant award
- Adding a new line item or zeroing a line item
- Change affects program goals and/or grant purpose
- Change includes staff positions that do not align with the grant purpose

Budget Requirements

- Explanation/justifications of revisions required
- Total personnel/program expenses must equal grant amount
- Direct expenses may not be reallocated to indirect
- Requests may be submitted by end of day:
 - Oct. 1st for single-year grants
 - Dec 31st for multi-year grants

Goal(s)

Criteria

- Change affects programs goals or grant purpose
 - Change in grant purpose required board approval
- Change includes staff positions that do not align with the grant purpose
- Grantee identifies concern in grant project



1st Step: Grantee sends Program Officer an email requesting a modification.

Grant Modifications



1st Step: Grantee sends Program Officer an email requesting a modification.

Methodist Healthcare Ministries

SEEKING HUMANITY TO HONOR GOD

Test Org Legal Name

INFORMATION

Landing Page

Portal Resources

ORGANIZATIONS (1)

Organizations (1)

CONTACT (1)

People (1)

APPLICATIONS

Invited to Apply

Clarification Requested

Submitted Applications

GRANTEE REPORTS (2)

Due (2)

Clarification Requested

Submitted

MODIFICATIONS (1)

New Modifications (1)

Clarifications Requested

Under Review

Approved

1

MODIFICATIONS (1)

New Modifications (1)

Clarifications Requested

Under Review

Approved

1

New Modifications (1)

Clarifications Requested

Under Review

Approved

1

New Modifications (1)

Clarifications Requested

Under Review

Approved

1

New Modifications (1)

Clarifications Requested

Under Review

Approved

1

New Modifications (1)

Clarifications Requested

Under Review

Approved

1

New Modifications (1)

Clarifications Requested

Under Review

Approved

▼ Budget Modification

Describe the budget modifications needed

T: B i u S' S, := ≡

↶ ↷

Download the [MHM Budget Modification Template](#) to complete your budget revisions requested.

Use the prompt below to upload your proposed revised budget template.

▼ Changes to Program Goals

The approved goals for your organization's goals are included below. Review the goals and use the text box to provide updates for MHM approval.

Program Goal #1:

Sample Priority 1: Create or expand Digital Connector or Digital Navigation programs.

Goal (Quantitative): During the grant period, 250 participants will be trained by 2 digital navigators across the 3 target counties for this project.

Changes to Goal 1

T: B i u S' S, := ≡

↶ ↷

We would like to expand to 3 digital navigators to be able to serve 300 participants

Grant Modifications



	Organization Name:	Methodist Healthcare Ministries	
	Project Title:	Going the Extra Mile	
		Start Date:	End Date:
	Grant Period:	1/1/2026	12/31/2026
	Grant Amount:	\$450,000	

2026 Grant Budget Modification Form

	Approved Budget	Revised Budget	\$ Change	Explanation of Revision
Salaries & Wages/Fringe Benefits (enter position title):				
Program Manager	\$ 50,000	\$ 40,000	\$ (10,000)	There was a vacancy in this position for 2 months so we offered Health Worker an increased salary since the current position was
Community Health Worker	\$ 63,750	\$ 73,750	\$ 10,000	sites than planned.
RN	\$ 75,000	\$ 75,000	\$ -	See explanation above
Total Salaries & Wages	\$ 188,750	\$ 188,750	\$ -	No Change
Fringe Benefits	\$ 33,750	\$ 33,750	\$ -	No Change
Total Salaries & Fringe Benefits	\$ 222,500	\$ 222,500	\$ -	

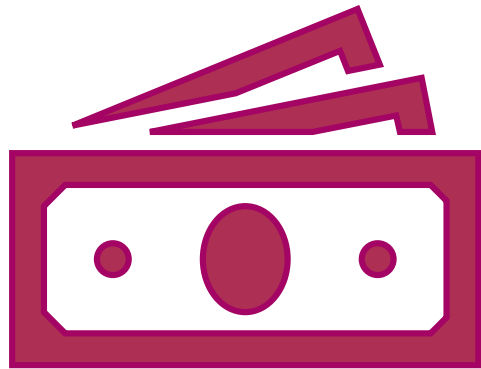


Quick Q & A

- Grant Modifications -



Methodist Healthcare Ministries
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2026 Grant Management

Financial Reporting

Mina Luna, Sr. Grants Accountant

Financial Reporting Template

Preparing to Report

- Financial report not required for general operating grants
- Template required for Cornerstone and Standard Grants program/project grants
- Small grants use their own template

Accessing the Template

- Template available in Fluxx
- Due Dates for Standard and Cornerstone:
 - July 15, 2026, mid-year report
 - Jan. 15, 2027, year-end report
- Due Date for Small Grants:
 - Jan. 15, 2027, year-end only

Financial Report Sample



Organization Name: Methodist Healthcare Ministries
Project Title: Going the Extra Mile
Start Date: 1/1/2026
End Date: 12/31/2026
Grant Period:
Grant Amount: \$ 575,000



2026 Mid-Year Financial Report

	2026 Approved Budget	Mid-Year Budget (Half of Approved Budget)	Expenses for period 1/1/26-6/30/26	2026 Grant Balance at 6/30/26	\$ Variance (Based on Mid-Year Budget)	% Variance	Variance Explanation (Required if Column F and Column G are highlighted yellow)
Salaries & Wages/Fringe Benefits (enter position title):							
Program Manager	\$ 50,000	\$ 25,000	\$ 30,000	\$ 20,000	\$ (5,000)	-10.00%	* The Community Health Worker position was vacant for the first quarter of the year. The position is now filled and the program is fully staffed.
Community Health Worker	\$ 63,750	\$ 31,875	\$ 14,000	\$ 49,750	\$ 17,875	28.04%	
RN	\$ 75,000	\$ 37,500	\$ 37,500	\$ 37,500	\$ -	0.00%	
Nurse Practitioner	\$ 125,000	\$ 62,500	\$ 77,000	\$ 48,000	\$ (14,500)	-11.60%	* The Nurse Practitioner was hired at a higher salary than anticipated so the expense for the first half of the year was higher than anticipated. Funds to cover the rest of the year will come from general operating funds.
Fringe Benefits	\$ 33,750	\$ 16,875	\$ 20,875	\$ 12,875	\$ (4,000)	-11.85%	
Program Expenses:							
Lab & Diagnostic Test	\$ 75,000	\$ 37,500	\$ 75,000	\$ -	\$ (37,500)	-50.00%	* The need for lab testing was higher than expected so the entire budget was spent in the first half of the year.
Contract Labor	\$ 75,000	\$ 37,500	\$ -	\$ 75,000	\$ 37,500	50.00%	* Our work for the updated EMR has not started. The project is expected to start in August and we fully expect the funds to be spent in the second half of the year.
Office Supplies	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ -	0.00%	
EHR Software	\$ 11,000	\$ 5,500	\$ 5,000	\$ 6,000	\$ 500	4.55%	
Computers	\$ 21,000	\$ 10,500	\$ 20,000	\$ 1,000	\$ (9,500)	-45.24%	* The computers were purchased in March 2025. With the remaining \$1,000, we plan to purchase extra monitors for the program staff.
Indirect Cost	\$ 35,500	\$ 17,750	\$ 17,750	\$ 17,750	\$ -	0.00%	
	\$ 575,000	\$ 287,500	\$ 302,125	\$ 272,875	\$ (14,625)	-3%	



Quick Q & A - Financial Reporting -



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MHM Branding & Media Guidelines

Refer to the attachment in your Welcome Email for guidelines on:

1. Notices regarding authorizations to photograph, public relations, social media, interview protocols, and media access
 - **Public grant announcements/press releases may not be made until after MHM's funding announcement in Spring 2026**
2. Using the full Methodist Healthcare Ministries organization name
 - No abbreviation or acronym
3. Boilerplate language and acknowledgements to be included in reports, publications, or other commissioned materials
4. The MHM Logo:
 - Placement guidelines, design elements and restrictions, and usage permissions
 - **Contact** the MHM Communications team at **communications@mhm.org** for logo use approval
 - Allow 2-4 weeks for approvals. Please cc your Program Officer.



Vertical or 'stacked' logo*



Horizontal logo

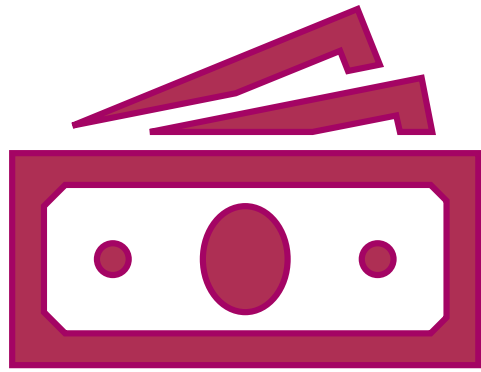


Quick Q & A

- Branding Guidelines -



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2026 Grant Management

Reporting

Breakout Rooms - 5 minutes



BREAK

5 MINUTES



Community Initiatives Digital Equity

Community Initiatives Team/Digital Equity

- **Monica Gonzalez**, Community Initiatives Manager
- **Eliseo Ceja**, Digital Equity Coordinator
- **Ismael Neri**, Program Associate

MHM Digital Equity Strategy



Ensure all people in our service region have access to reliable, affordable broadband service and the skills and opportunities to use this technology safely and effectively to support their economic, health and social needs.

Strategic Alignment & Desired Outcomes



Ecosystem Development

Advocate for program and policy changes, serve as convenor and capacity builder, and foster partnerships to bring additional resources.

Impact Systemic Change:

- Increase affordable connectivity
- Leverage external funding opportunities & program sustainability
- Increase data accuracy for policy makers & future decisions

Through Digital Navigators & Connectors we Support:



Device Access & Connectivity

Community computer hubs, device distribution and internet adoption through partnerships, investments and corporate donors.



Digital Skills

Digital skills training to increase employment opportunities and improve educational, health and social outcomes.



Online Benefit Enrollment

Enrollment of online benefit applications, i.e. SNAP, Medicaid, Social Security, Rent and Utility Assistance.

Strengthen Communities & Transform Internal Processes:

- Improve device access
- Increase internet adoption
- Enhance digital literacy
- Improve health & well-being by enrolling in eligible benefits & services

Digital Equity Cohort Objectives

- To increase the capacity of community-based organizations and community anchor institutions to provide critical digital resources and services.
- To build relationships and build a sense of collective work to advance digital equity in South Texas.
- Align efforts, strengthen partnerships, and lay the groundwork for future funding opportunities.

Digital Equity Cohort

Bastrop County Cares

Institute for Local Self-Reliance

Brownsville Housing Opportunity Corporation

Intercultural Development Research Association

Building Promise USA

Kinney County

City of Mercedes - Dr. Hector P. Garcia Memorial Library

La Union del Pueblo Entero (LUPE)

City of Pharr

Latinitas

Community Council of South Central Texas, Inc.

MHP Salud

DigitalLift

Mission Road Developmental Center

Compudopt

Older Adults Technology Services

Connect Humanity - Rio Grande Valley Broadband Coalition

People's Community Clinic

Empower House SA

Restore Education

Family Service Association of San Antonio Inc.

Rocksprings Independent School District

Family Violence Prevention Services, Inc.

SA Digital Connects

Frontera Healthcare Network

South Texas Family Planning & Health Corporation

Girls Inc. Of San Antonio

South Texas Rural Health Services, Inc.

Goodwill Industries of San Antonio

Sunrise Homeless Navigation Center

Goodwill of Central Texas

Texas Appleseed

Human-I-T

2024 Digital Equity Grantees



Supported **6,453** individuals using patient portals for telehealth or scheduling appointments



Enrolled **1,957** individuals for SNAP benefits



Hired **92** digital health advocates, digital connectors/ navigators & trained **27** youth digital ambassadors



Distributed **17,340** devices



Provided **3,947** individuals with 1:1 digital navigation services



Collaborated with other grantees, city/county governments, and the Texas Broadband Development Office to support the development of broadband infrastructure in rural areas

Upcoming Events:

- Digital Equity Cohort Virtual Kickoff : Feb 19, 2026
- Digital Equity Webinar: Apr 22, 2026
- Digital Equity Webinar: Jun 25, 2026
- Digital Equity In-person: TBD
- National Digital Inclusion Week (Oct 2026 - TBD)
- Digital Equity Webinar: Nov 4, 2026





Capacity Building

Capacity Building Team

What is Capacity Building?

Type your answer in the chat! (You may select multiple answers)

- A. Working with individuals and organizations to help develop and strengthen their abilities
- B. Providing learning opportunities or resources
- C. Vetting grant opportunities
- D. Providing funding for consultants, staffing, or technology

Your Capacity Building Team

- **Sandy Doughton**, Capacity Building Manager
- **Lindsay Morgan**, Sr. Capacity Building Specialist
- **Chloé Laurence (she/her)**, Capacity Building Specialist

Capacity Building Services

Fill out our
Interest Form if interested in
capacity building!
forms.office.com/r/GKreJLXBSS

Service/Program	Admission Cycle	Capacity	Duration	Description
Leadership Development	Annually (Jan-Feb)*	25	6 monthly meetings	Training series for executives in MHM's grantee organizations, topics include coaching for high performance, emotional intelligence, crucial conversations, valuing diversity, and more.
*Currently recruiting				
Peer Learning Cohort	Annually (Jan-Feb)*	12	9 monthly meetings (Mar-Nov)	Monthly virtual meetings for grantees to learn about development/fundraising topics facilitated by MHM's CB team and guest speakers. Participants are paired each month with a development homework assignment, and connection between meetings is encouraged.
Catchafire	Annually (Oct-Nov)	23	1 year (Jan-Dec)	Online service to match nonprofits to highly skilled professional volunteers who fulfill nonprofits' requests for consultations, training, advice, and project-based support.
Consultant Connections	Limited basis		Project Based	Funding provided to select partners to support a contract with a consultant for a specific project. Referred by POs or CB Specialists.

Capacity Building Resources on MHM.org

Capacity Building Services

Capacity Building is a process of working with individuals and organizations to help develop and strengthen their abilities. Capacity building forms a thought partnership between MHM team members and nonprofits that values co-creation, trust, equity, shared learning, and collaboration. To ensure we meet nonprofit partners where they are, we use an asset-based approach—recognizing an organization's strengths first before identifying opportunities for strengthening. Capacity building is customized with the nonprofit partner in mind and usually focused on a specific operational area(s) such as, but not limited to, fundraising, finance & accounting, and human resources, or a program. Capacity Building services for our partners include peer learning and leadership development cohorts, 1:1 coaching & technical assistance in areas that might need uplifting, online learning platform services, access to resources, and connection to consultants.

Check out our resources at
mhm.org/grantmaking/#capacity-building

Capacity Building Blog Series

The capacity-building team developed a blog series covering a wide range of topics that may interest nonprofit organizations. Check out the latest entry in this ongoing series.



The Impact of Storytelling: A Conversation...



Capacity Building Series: The Power of Nonprofit Storytelling



Capacity Building Series: Board Member Engagement - Relationship...

Leadership Development

"What I appreciated most was the emphasis on self-awareness and authentic leadership. It wasn't just about learning strategies, it was about understanding who we are as leaders, what drives us, and how to use our strengths to serve others more effectively. The discussions, personal reflections, and connection with other leaders helped me grow both personally and professionally."



Peer Learning Cohort

"I would strongly recommend the Peer Learning Cohort as I feel my knowledge and experience was doubled throughout the cohort. Getting to meet and learn from other entities was also rewarding. Chloe and MHM team really blew this Peer Learning Cohort out of the water. From assigned homework to pairings with partners, it was great."

"It's Giving...Impact" **How to Find, Keep, and Grow Your Supporters**



Katy Walterscheidt
Meadows Mental Health Policy Institute

.....>

Children's Advocacy Center of Cameron and Willacy Counties

• **Services include:**

- Forensic Interviews
- Victim Advocacy Services
- Therapy and Counseling Services
- Community Education and Outreach
- MDT Coordinated Team Approach
- Monica's and Maggie's Closet
- Parent Support Group- Weekly



How to Access Capacity Building Services

Interested in our services?

Fill out our 2026

Capacity Building Interest Form at

forms.office.com/r/GKreJLXBSS

Have questions or want to learn more?

Contact us!

Send an email to

CICapacityBuilding@mhmm.org



Policy and Advocacy

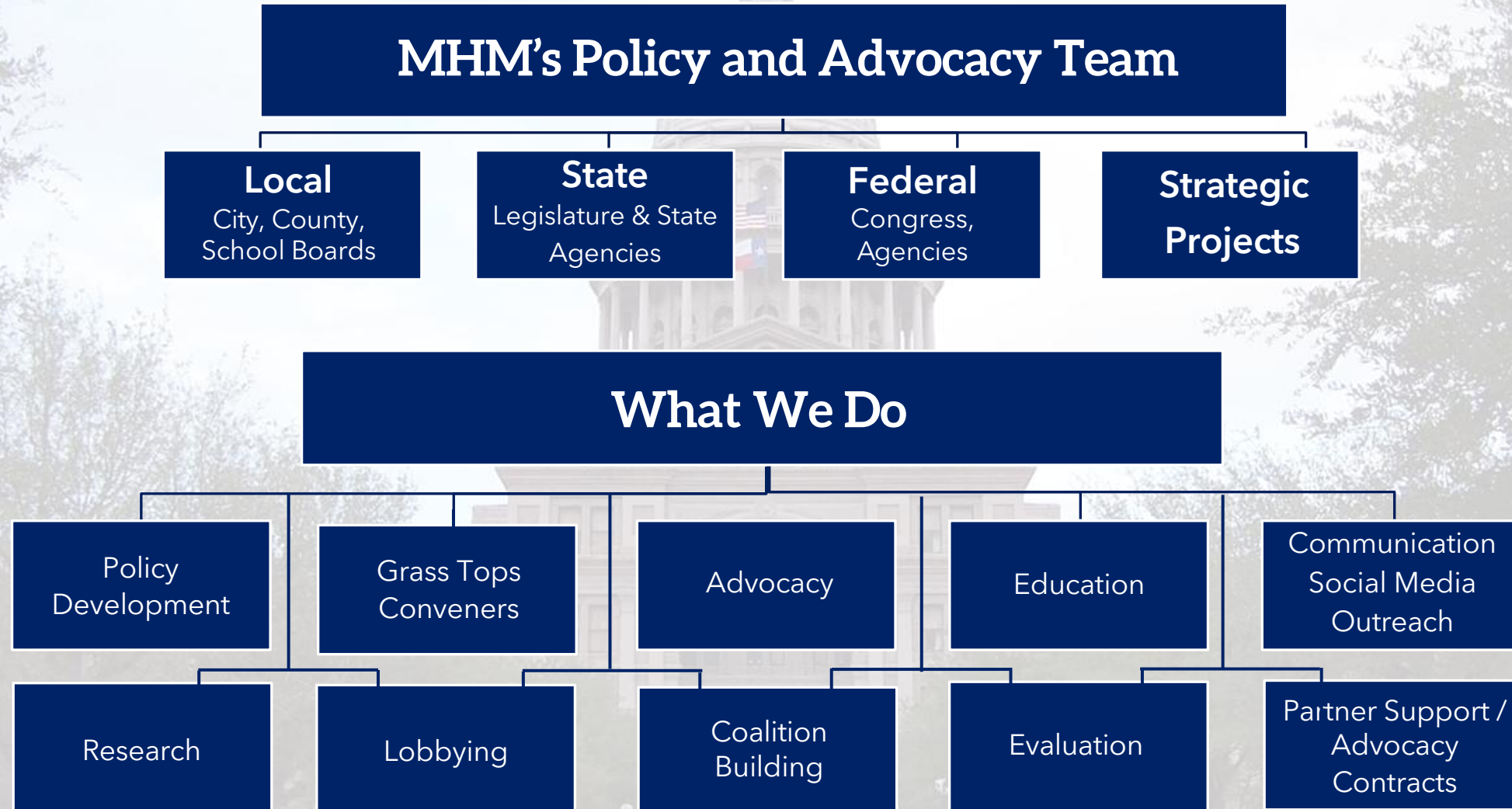
Policy and Advocacy

Chris Yanas,
VP of Policy and Advocacy

Emilio Arriola,
Policy and Advocacy Manager



Policy and Advocacy Department



MHM Legislative Priorities



Access to Affordable
& Quality Health Care



Behavioral Health



Children's Health



Women's Health



Healthcare Workforce



Public Health



Housing



Food Security &
Nutrition



Public Infrastructure



Broadband



Emerging Issues

How Policy & Advocacy Can Serve You

- Serve as a resource
- Advocate for you
- Technical support/advice on government grants
- Presentations/summaries of legislation
- Provide information
 - Sign up for our newsletter!

How to Stay Connected

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Sign up NOW!

Feedback

- We want to hear from you!
- Partners can directly submit complaints, compliments, or suggestions via:
 - mhmfeedback@mhm.org
 - (210) 253-3229
 - QR code



Do you have a compliment,
suggestion or complaint?

Please tell us!



Talk to a member of our team, or ask to speak to a manager.



Scan the QR code below and fill out the form.



email
mhmfeedback@mhm.org



Call 210-253-3229



¿Tiene algún cumplido,
sugerencia o queja?

Por favor, ¡díganoslo!



Hable con un miembro de nuestro equipo o pida hablar con un supervisor.



Escanee el siguiente código QR y rellene el formulario.



correo electrónico
mhmfeedback@mhm.org



Llame al 210-253-3229



Grantee Resources

Website: www.mhm.org/grantmaking

- Theories of Change
- Frequently Asked Questions (FAQs)
- Documents and Resources Library
- Glossary of Terms
- Fiscal Sponsorships
- Wesley Nurses

Email: CommInvestments@mhm.org



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"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



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Community Investments Grantmaking Team

MHM.org