

2023 Grantmaking Community Investments



Methodist
Healthcare
Ministries
OF SOUTH TEXAS, INC.

"Serving Humanity to Honor God"

Community Investment Strategy

CHARITO LINCOLN

DIRECTOR OF COMMUNITY INVESTMENTS

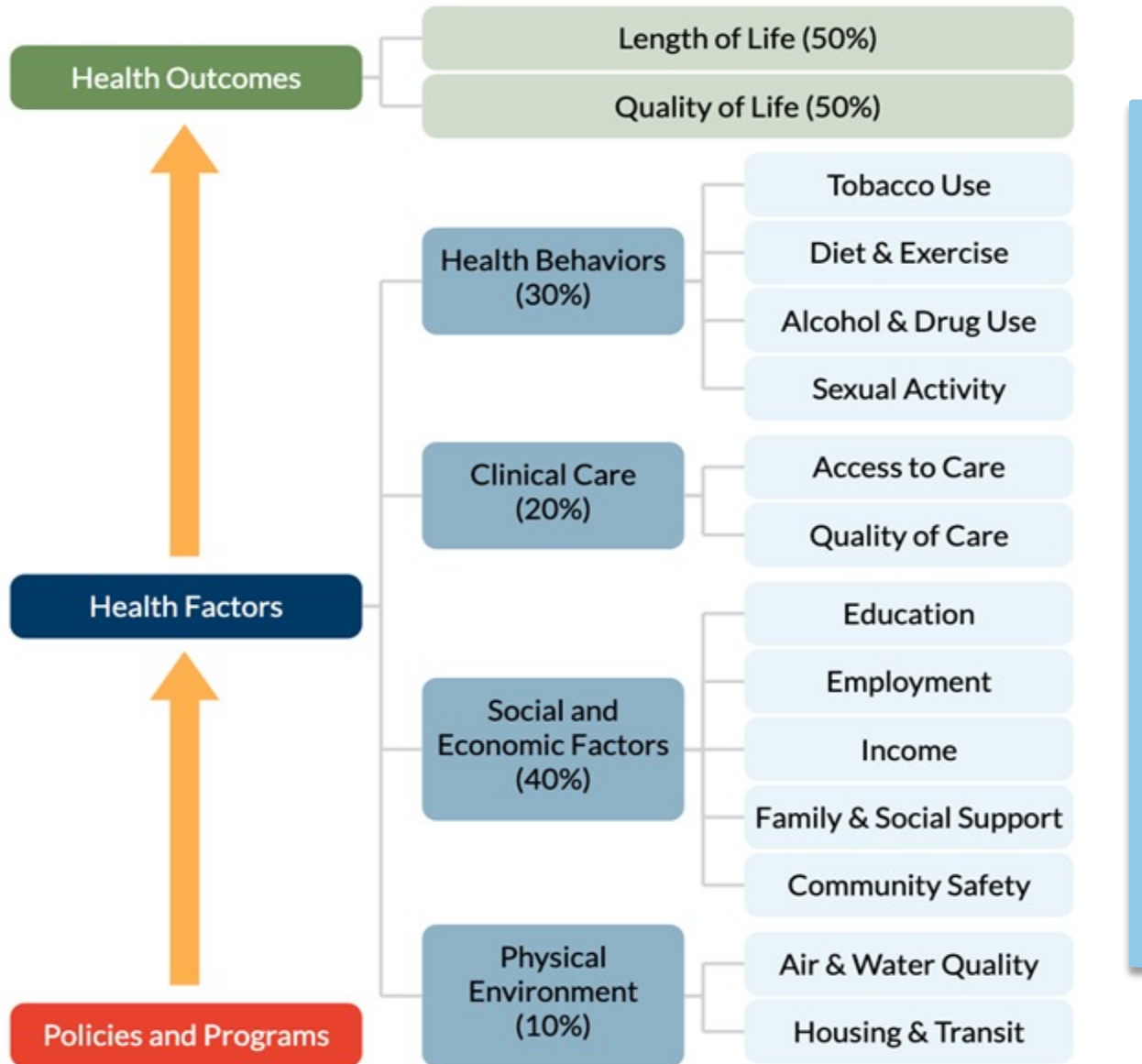
The bottom of the slide features a decorative design with two overlapping geometric shapes: a dark blue triangle on the left and a magenta triangle on the right, meeting at a diagonal line.

Health Equity

Methodist Healthcare Ministries 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.

Social Determinants of Health



MHM Goal:

Help create and sustain healthy communities by supporting organizations that address the community conditions in which we are born, grow, live, and work (*known as the Social Determinants of Health (SDoH)*).

SOCIAL DETERMINANTS AND SOCIAL NEEDS: MOVING BEYOND MIDSTREAM



Downstream Impact

Providing or ensuring access to clinical care

Ensuring **individuals** have **access** to medical/behavioral healthcare when presenting with health challenges.

Focused on individual impact

Interventions that address a specific medical and/or behavioral **need of a patient**, such as a primary care or counseling visit.

Example

A clinic provides dental care to uninsured patients at no cost.

Midstream Impact

**Addresses
individuals'
social needs**

Assessing and connecting individuals to community resources, **multiple SDoH factors** addressed.

**Focused on
individual
impact**

Supporting **community-based organizations and interventions** that identify clients' social needs, providing and/or connect them to **resources that improve quality of life.**

Example

Patient screening questions about social factors like housing and food access – using data to inform care and provide referrals.

Upstream Impact

Improve Community Conditions

Addressing laws, policies, practices, and/or **root causes**. Focus on **community** (not individual) **impact**.

Focused on community impact

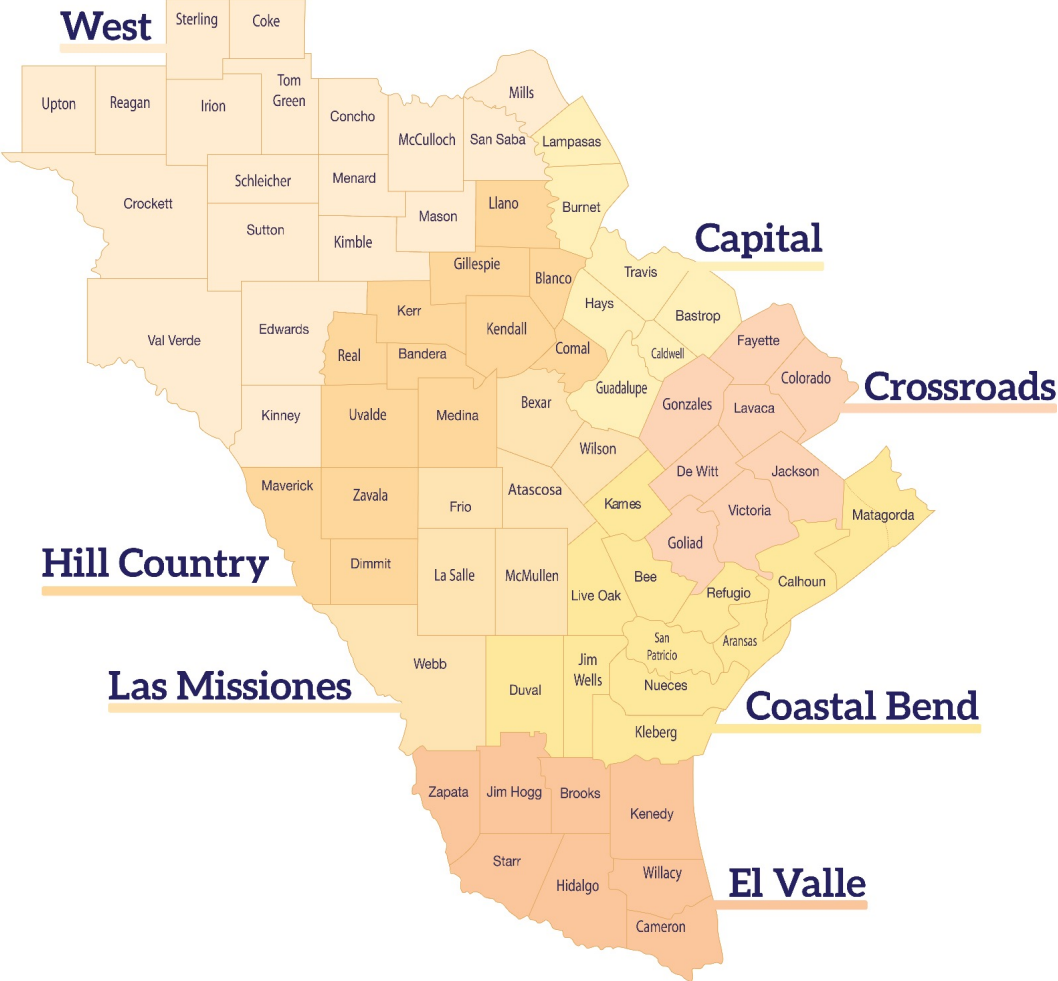
Improving community conditions to **facilitate equitable and sustainable change**, allowing communities to thrive.

Example

A collaborative or organization focuses on:

- Addressing school policies that inhibit access to mental health services for students
- Scarcity of mental health care providers in low-income communities
- Addressing transportation constraints for youth

MHM's Service Area



2023 Investment Focus Areas



Access to Care -
Mental &
Behavioral Health
(25%)



Digital Inclusion &
Broadband
Infrastructure
(25%)



Housing (5%)



Food Security (10%)



Access to Care –
General (20%)



Economic Mobility:
Financial
Independence (10%)



Education &
Workforce
Development (5%)

Focus Area	Description
Access to Care – Mental & Behavioral Health (25%)	Equitable healthcare access that addresses the mental and behavioral needs of underserved youth and adults, especially in Mental Health Providers Shortage Areas.
Access to Care – General (20%)	Efforts to promote equitable access to holistic approaches to health care for the underserved, especially those who reside in Medically Underserved Areas or Health Professional Shortage Areas.
Digital Inclusion & Broadband Infrastructure (25%)	Support broadband and telehealth approaches that help close the digital divide through infrastructure, affordability, access to tools/resources, and digital skills training .
Food Security (10%)	Approaches that improve food security in communities by improving access to healthy, culturally appropriate and/or affordable foods . To create equitable and sustainable food systems , this includes supporting community-led food initiatives that are linked to local food production, distribution, and labor practices.
Economic Mobility: Financial Independence (10%)	Efforts that focuses on strengthening low-income people’s financial inclusion, knowledge, behaviors and opportunities through financial information, education and coaching opportunities , along with capital and asset building to develop financial capability and security.
Housing (5%)	Efforts that provide fair and equitable housing to low- and moderate-income individuals.
Education & Workforce Development (5%)	Efforts that provide education and workforce development opportunities to increase the earning potential of low- and moderate- income individuals.

Community Investments

Commitment to Partnership



Through cultivating engaged philanthropy that supports and strengthens the wellbeing and resilience of community partners, our investments will support and foster equitable solutions to promote healthier families and thriving communities.

Grants Cycle Process



Team Introductions

Venessa Medina, Grants Accounting Manager

David Rodriguez, Sr. Grants Accountant

Melissa Flores, Sr. Grants Analyst

Melissa Viesca-Benavidez, Sr. Grants Accountant

Sandy Doughton, Grants Development Manager

Brooke Gillespie, Sr. Grants Development Specialist

Melanie Call, Community Investments Manager

Ashley Hernandez, Program Officer

Giovanna Valverde, Program Officer

Jane Hevezi, Sr. Program Officer

Monica Gonzalez, Sr. Program Officer

Patty Barron, Sr. Database Analyst

How to Apply

Grant Cycle Timeline

Timeline	
May 4	Convening
May 5	Letters of Interest Open
June 3	Letters of Interest Due
July 15	Invitations to Apply
August 19	Applications Due
December 15	Notifications sent

Funding Request Types

Project/Program

(request may include capital/renovation or capacity building costs associated with project/program)

Capital/Renovations

(request is solely for capital/renovations)

Capacity building

(request is solely for capacity building)

Capacity Building

Capacity building is an investment in the **effectiveness and future sustainability of a nonprofit.**

It is the process of **building and strengthening** the **systems, structures**, cultures, skills, **resources**, and power that organizations need to serve their communities.

Source: <https://www.councilofnonprofits.org/tools-resources/what-capacity-building>

Grant Period Options

Years	Time Period	Who can apply
1	January 2023 – December 2023	All
2	January 2023 – December 2024	2022 MHM Funded Partners*
3	January 2023 – December 2025	2022 MHM Funded Partners*

*2022 MHM Funded Partners through Community Investments in good standing

Submission Information



All funding inquiries are submitted digitally;
no paper submissions are accepted



Applying organization will submit
information via MHM online grant portal



LOI links and Grant Guidelines are
provided on MHM website



Technical difficulties support:
comminvestments@mhmm.org

Resources

Website: www.mhm.org/grantmaking

- Grant Guidelines
- Frequently Asked Questions (FAQs)
- Convening PowerPoint Presentation
- Recording of Convening Presentation
- Documents and Resources Library
- Definitions

Email: CommInvestments@mhm.org

Eligibility Quiz

Eligibility Criteria

- Address one or more strategic focus areas
- Serve one or more counties in MHM's 74-county service area
- Must be a 501(c)3 or tax-exempt entity
- Organization or its fiscal sponsor must have had its 501(c)3 or tax-exempt status for at least one year
- Must not be requesting ineligible funds (e.g., land, legal fees)

MHM Does Not Fund:

- Endowments
- Financial deficits or debt reduction
- Fundraising events
- Grants or Scholarships to individuals
- Insurance, including general liability, professional liability, etc.
- Land
- Legal fees
- Lobbying on behalf of political candidates

In-scope/out-of-scope (refer to Grant Guidelines)

Letter of Interest (LOI)



Brief overview
of organization,
community
impact, and
core services



Focus Area(s)



Stream



Organizational
Budget



Size of
Organization
(staff)

Organizational Information

LOI Submission Information

Request Title

Request Type

Request Length (single/multi-year)

Grant Period

Request Need

Request Summary

Individuals Served

Economic Status

LOI Submission Information

Referral

Request Focus Area

Request Focus Area Alignment

Request Stream

Health Equity

Request Amount

Project Budget

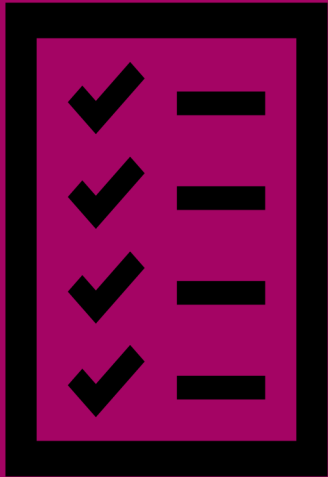
Budget Summary

Fiscal Sponsorship

- Fiscal sponsor must have 501(c)(3) or tax-exempt status for at least one year.
- Partnership must be identified at the time of LOI submission.
- Fiscal Sponsor must have capacity to manage funds, comply with MHM grant requirements, and support the project as outlined in the grant submission.
- IRS requires fiscal sponsors to exercise control of funding and disburse to project or program in accordance with the submitted grant budget.
- Funder holds fiscal sponsor legally responsible to use funding as intended.
- As a fiscal sponsor, a portion of the requested grant monies is allowable for sponsor responsibilities.

Scoring Rubric

Scored on a four criteria scale



Criterion 1: Request Need & Feasibility- 25%

Criterion 2: Strategic Impact- 30%

Criterion 3: Budget Alignment & Request Design- 20%

Criterion 4: Organization Mission- 25%



Methodist Healthcare Ministries

OF SOUTH TEXAS, INC.

"Serving Humanity to Honor God"

Application



Submission Information

- **Need** (Pre-populated from LOI submission)
- **Summary** (Pre-populated from LOI submission)
- **Community Served**
 - How do you involve community members in developing and/or implementing the grant request?
- **Target Population**
 - Age
 - Ethnicity
 - Underserved Population
- **Geographic Location(s)**

Submission Information



- Sustainability
- Root Causes, Systems, or Policy Changes
- SMART Goals
 - Multi-year requests
- Evaluation
- Collaboration
- Board Involvement

Scoring Rubric: will be made available to those who advance to application stage.

Required Attachments



- List of Board of Directors (include affiliation)
- Organizational Budget (Board approved)
- Request Budget
- Interim Financials
- IRS Determination Letter
- 2022 MHM Funded Partners: most recent Audited Financial Statements; if unavailable, provide most recent 990
- New Applicants: two years of Audited Financial Statements; if unavailable, provide two most recent 990s
- Strategic Plan (optional)

Evaluation

Application

Goals & Evaluation

Goals

Identify the goals for the request. Include a maximum of five goals that capture the impact of the request. Your goals should be SMART (Specific, Measurable, Attainable, Relevant, Timebound).

Evaluation

Please describe how you will measure the short and long-term impact of your request. What will indicate your progress? How will your organization know your request is successful?

GOALS: Include up to 5 SMART goals

	Specific	Measurable	Achievable	Relevant	Timebound	Goal Statement
	What will you accomplish? Who will accomplish it and for whom ?	How will we quantify success? How much change should happen?	Is the goal doable and in alignment with existing and requested resources?	Will this goal help make progress toward the purpose of the request?	By when will this goal be met?	Use the brainstorm to draft a short goal statement.
Goal 1	<ul style="list-style-type: none"> What Who For whom 	<ul style="list-style-type: none"> Measure Target 	?	?	<ul style="list-style-type: none"> When 	[Who] will do [what] resulting in [measure] by [when].
						By [when], [who] will do [what] resulting in [measure].
						By [when], [measure - includes who and what].

Application Goals & Evaluation

Outcome Goals

Changes among client or community in the following:

- Behaviors
- Attitudes/opinions
- Knowledge and skills
- Circumstances or conditions
 - i.e. percent improving health outcome, percent of clients in stable housing;
 - Availability of stable housing

Process/Administrative Goals

- The milestones, agreements or developments that must be accomplished in order to achieve the program outcome goals
- Goals related to improvement in quality or process of your service delivery

Goals Relevant to the “stream” of your Request

- Upstream
- Midstream
- Downstream

SMART Goal Examples

Downstream

Providing or
ensuring
access to
clinical care

Outcome Goals

- By the end of 2023, diabetic patients receiving ABC Health Clinic's diabetes education will score an average 10% improvement between their pre- and post- diabetes knowledge surveys.

Process/Administrative Goals

- By the end of 2023, 100% of ABC Health Clinic's diabetic and pre-diabetic patients will receive at least one session of diabetes education from the diabetes educators.
- ABC Health Clinic will screen at least 75% of active patients with the PHQ-9 at least annually by December 31, 2023.

SMART Goal Examples

Midstream

Addresses individuals' social needs

Outcome Goals

- 95% of participants who complete the ABC Community Organization financial skills program in 2023 will score 80% or greater on the financial skills assessment.
- By December 31, 2023, 95% of participants who have completed ABC Community Organization's financial skills program will have access to a bank account.

Process/Administrative Goals

- By June 1, 2023, 100% of ABC Community Organization's nutrition program participants will be able to participate in their preferred language (English/Spanish).

SMART Goal Examples

Upstream

Improve
community
conditions

Outcome Goals

- Our Town Food Justice Alliance will increase the percent of convenience stores in "Our Town" selling fruits and vegetables from a baseline of 35% to 50% by the end of 2023, as measured by an annual survey.

Process/Administrative Goals

- By March 1, 2023, Our County Community Action will execute MOUs with at least 3 entities in "Our County" to form a digital inclusion coalition.

Evaluation:

Please describe how you will measure the short and long-term impact of your request. What will indicate your progress? How will your organization know your request is successful?

Goal	Measure & target	Data source	Timing of data collection	Who collects data	Statement for Application
1: Increase the percent of convenience stores selling fruits and vegetables from a baseline of 35% to 50% by the end of 2023.	# of stores selling produce / # of stores in Our Town Target: 50%	Annual census of convenience stores	Each year in November	Team of 3 volunteers	For Goal 1, we will measure progress toward improving access to produce in convenience stores through an annual census of convenience stores that counts how many convenience stores offer produce. This survey will be done by volunteers each November and will be reported in our year-end report.
2: 95% of participants who complete the financial skills program in 2023 will score at least 80% on the financial skills assessment.	# of participants scoring >79% / # of participants completing program Target: 95%	Post-program financial knowledge questionnaire	Delivered to each participant when they complete program (rolling)	Financial skills educator	For Goal 2, we will measure improvement in financial skills with a post-program questionnaire that includes validated questions on financial skills and knowledge. We will measure the number of participants achieving at least 80% divided by the total number who complete the program. Financial Skills Educator will provide this questionnaire to each participant when they complete the program. We will report most recent data in mid-year and year-end reports.

Budgets and Financials

2023 Operational Budget Form Template (Excel Workbook)

- Instructions Tab
- Operational Budget Form Tab
- Personnel Schedule Tab
- Operational Budget Form Tab (Sample)
- Personnel Schedule Tab (Sample)



2023 Operational Budget Form

Methodist Healthcare Ministries Grant Budget									
Budget Period: January 1, 2023 to December 31, 2023									
Organization Name:		Enter Organization Name							
Project Title:		Enter Project Title							
REVENUE		MHM Request	Other Funding Sources Amount	Project Total	Description <i>Identify any fund requests with amounts and whether they are planned, pending, or committed.</i>				
Requested Amount from MHM			\$	-					
Contributed			\$	-					
Government (federal, state, local)			\$	-					
Foundation			\$	-					
Corporation			\$	-					
Individuals			\$	-					
United Way/Redeemed Campaigns			\$	-					
Other (specify)			\$	-					
Earmarked			\$	-					
Fundraising event income (gross)			\$	-					
In-Kind Support			\$	-					
Other (specify)			\$	-					
Other (specify)			\$	-					
Total Revenue		\$	-	\$					
EXPENSES		MHM Request	Other Funding Sources Amount	Project Total	Justification				
Personnel (Salaries and Wages) and Benefits (FICA and Other Benefits) from Personnel Schedule Tab.									
This tab is only required if Salaries and Benefits will be part of your MHM Request.		\$	-	\$	See Personnel Tab for justification (if applicable).				
Contract Labor (Consultant, Agency or Hourly work or name or TBD)		Method of Payment (Hourly/Weekly, Monthly, Lump Sum)							
			\$	-					
			\$	-					
			\$	-					
Staff development and training		Number of employees	Rate						
			\$	-					
			\$	-					
			\$	-					
Conferences, travel and lodging		Number of Employees			Purpose of Travel, Destination (Location, City/State)	Justification (i.e. Conference Fee, Airfare + \$400 Rights X 3 employees, Lodging + \$120 Hotel X 3 employees X 3 nights)			
			\$	-					
			\$	-					
			\$	-					
Inborn Mileage (Destination, # of trips, # of employees)		Mileage Total (\$)	Costs (\$ (i.e. parking, rental car)		Purpose of Mileage				
			\$	-					
			\$	-					
			\$	-					
Other Expenses (specify)					Justification (Provide details for estimated amounts and purpose of program expenses)				
			\$	-					
			\$	-					
			\$	-					
			\$	-					
			\$	-					
			\$	-					
			\$	-					
			\$	-					
			\$	-					
			\$	-					
Indirect Expenses (Not to Exceed 15% of total direct costs)			\$	-					
Total Expenses		\$	-	\$					
SUMMARY OF FINANCIAL REQUEST		Program Net Income (Total Project Revenue less Total Project Expenses)			\$	-			
		Total MHM Requested			\$	-			
		MHM Funding percentages (Total Project Expenses/Total MHM Requested)			\$	ID#(V)			
		Total organizational operating budget. (Must tie to Operating Budget submitted with application)			\$	-			
		% of org budget funded by MHM (Total MHM Requested/Total organizational operating budget)			\$	ID#(V)			
Grant advances for this award may be available. Please indicate if an advance will be requested in 2023. (Yes or No) --									
Projected Budget Amounts	How much of the grant do you plan to spend each quarter in the grant period?	Quarter 1 - 2023	Quarter 2 - 2023	Quarter 3 - 2023	Quarter 4 - 2023				

Reminder: MHM will not fund general liability insurance, professional liability insurance, personal liability insurance, audit fees, and purchases or legal fees. Indirect costs may be included up to 15% of direct expenses.

Revenues

Expenses

Other Financial Questions

2023 Operational Budget Form-Revenues

Methodist Healthcare Ministries Grant Budget

Budget Period: January 1, 2023 to December 31, 2023

Organization Name:	ABC Organization			
Project Title:	ABC Project			
REVENUE	MHM Request	Other Funding Sources Amount	Project Total	Description <i>Identify any funder requests with amounts and whether they are planned, pending, or committed.</i>
Requested Amount from MHM	\$ 181,750.00		\$ 181,750.00	
Contributed		\$ 25,000	\$ 25,000	Private Donations (Pending)
Government (federal, state, local)		\$ 50,000	\$ 50,000	SAMSHA Grant (Committed)
Foundation		\$ 10,000	\$ 10,000	HEB Foundation (Committed)
Corporation			\$ -	
Individuals			\$ -	
United Way/Federated Campaigns			\$ -	
Other (specify)			\$ -	
Earned			\$ -	
Fundraising event income (gross)		\$ 118,250	\$ 118,250	Annual Gala (Planned)
In-Kind Support			\$ -	
Other (specify)			\$ -	
Other (specify)			\$ -	
Total Revenue	\$ 181,750	\$ 203,250	\$ 385,000	

2023 Operational Budget Form-Expenses

EXPENSES			MHM Request	Other Funding Sources Amount	Project Total	Justification
Personnel (Salaries and Wages) and Benefits (FICA and Other Benefits) from Personnel Schedule Tab. This tab is only required if Salaries and Benefits will be part of your MHM Request.			↓	↓	↓	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Automatically populates from 3rd tab(Personnel Schedule) </div> See Personnel Tab for justification (if applicable).
			\$ -	\$ -	\$ -	
Contract Labor (Consultant, Agency or Hourly worker name or TBD)	Method of Payment (Hourly, Weekly, Monthly, Lump Sum)					
					\$ -	
					\$ -	
					\$ -	
Staff development and training	Number of employees	Rate				
			\$ -		\$ -	
			\$ -		\$ -	
			\$ -		\$ -	
Conferences, travel and lodging	Number of Employees					Justification (i.e. Registration Fee, Airfare = \$400 flights X 3 employees, Lodging = \$120 Hotel X 3 employees X 5 nights, Meals = \$100 x 3 employees x 5 days = \$1,500)
						Purpose of Travel, Destination (Location City/State)
					\$ -	
					\$ -	
					\$ -	
Intown Mileage (Destination, # of trips, # of employees)	Mileage Total (\$)	Costs (\$) (i.e. parking, rental car,				Purpose of Mileage
					\$ -	
					\$ -	
					\$ -	

2023 Operational Budget Form-Expenses Example

EXPENSES			MHM Request	Other Funding Sources Amount	Project Total	Justification
Personnel (Salaries and Wages) and Benefits (FICA and Other Benefits) from Personnel Schedule Tab. This tab is only required if Salaries and Benefits will be part of your MHM Request.			\$ 31,750	\$ 143,250	\$ 175,000	See Personnel Tab for justification (if applicable).
Contract Labor (Consultant, Agency or Hourly worker name or TBD)	Method of Payment (Hourly, Weekly, Monthly, Lump Sum)					
Maria Cruz, LPC	\$1,667 a month		\$ 20,000		\$ 20,000	LPC for Child Therapy
					\$ -	
					\$ -	
Staff development and training	Number of employees	Rate				
Psychotherapist C.E. training	20	\$ 100	\$ 2,000	\$ 1,000	\$ 3,000	Annual requirement
			\$ -		\$ -	
			\$ -		\$ -	
Conferences, travel and lodging	Number of Employees					Purpose of Travel, Destination (Location City/State) Justification (i.e. Registration Fee, Airfare = \$400 flights X 3 employees, Lodging = \$120 Hotel X 3 employees X 5 nights, Meals = \$100 x 3 employees x 5 days = \$1,500)
Conference Fees	10		\$ 12,000		\$ 12,000	Annual Association Conference, Austin, TX Conference Fee \$500 x 10 employees, Airfare = \$400 flights X 10 employees, Lodging = \$100 Hotel X 10 employees X 3 nights)
					\$ -	
					\$ -	
Intown Mileage (Destination, # of trips, # of employees)	Mileage Total (\$)	Costs (\$) (i.e. parking, rental car,				Purpose of Mileage
Crystal City/12 trips/2 caseworkers	\$ 12,000.00	\$1,000.00	\$ 13,000		\$ 13,000	Parent outreach
					\$ -	
					\$ -	

2023 Operational Budget Form-Expenses

Example (continued)

<i>Other Expenses (specify)</i>			<i>Justification (Provide details for estimated amounts and purpose of program expenses)</i>		
Office Supplies	\$ 8,000	\$ 8,000	\$ 16,000	Consumable office supplies for staff	
Telecommunications	\$ 5,000	\$ 7,000	\$ 12,000	Internet/ Telephone Service for Support Staff	
Printer/Computer Rental	\$ 3,000	\$ 7,000	\$ 10,000	Clinical computer rentals from Dell for 20 staff	
Lab & Diagnostic Test	\$ 4,000	\$ 4,750	\$ 8,750	Bloodwork, kidney/liver testing, etc for 1,000 patients	
Equipment	\$ 6,500	\$ 15,000	\$ 21,500	External Server, replacement terminals, including needed software	
Dues & Subscriptions	\$ 6,500	\$ 11,000	\$ 17,500	Dues to other organizations who provide	
Prescriptions & Medications	\$ 10,000	\$ 9,500	\$ 19,500	Assist Clients with Prescription, and Labs	
Dental Exams, Cleanings & Work	\$ 12,500	\$ 10,000	\$ 22,500	Assist Clients with Dental Exams & Dental Work	
Eye Exam & Glasses	\$ 17,500	\$ 4,000	\$ 21,500	Assist Clients with Eye Exams & Eye Glasses	
Community Outreach	\$ 10,000	\$ 7,750	\$ 17,750	Funds request for material costs such as printing of brochures, flyers and mail-outs, as well as other print and advertising material to community and area supporters.	
Wellness Incentives	\$ 5,000	\$ 15,000	\$ 20,000	Clergy incentives and support for emotional, spiritual and physical wellness programs; retreats	
			\$ -		
			\$ -		
			\$ -		
Indirect Expenses (Not to Exceed 15% of total direct costs)	\$ 15,000	\$ 135,000	\$ 150,000		
Total Expenses	\$ 181,750	\$ 378,250	\$ 560,000		

2023 Operational Budget Form-Other Financial Questions

SUMMARY OF FINANCIAL REQUEST	Total MHM Requested	\$	181,750.00	Pre-populated from Revenue Section	
	Program Net Income <i>(Total Project Revenue less Total Project Expenses)</i>	\$	5,000.00		
Must tie to attachment	MHM Funding percentages <i>(Total Project Expenses/Total MHM Requested)</i>		32%	Automatically calculates	
	Total organizational operating budget <i>(Must tie to Operating Budget submitted with application)</i>	\$	10,000,000.00		
	% of org budget funded by MHM <i>(Total MHM Requested/Total organizational operating budget)</i>		2%		
Grant advances for this award may be available. Please indicate if an advance will be requested in 2023. (Yes or No) →			YES		
Projected Budget Amounts	How much of the grant do you plan to spend each quarter in the grant period?	Quarter 1 - 2023	Quarter 2 - 2023	Quarter 3 - 2023	Quarter 4 - 2023
		\$ 36,750.00	\$ 35,000.00	\$ 40,000.00	\$ 70,000.00
Reminder: MHM will not fund general liability insurance, professional liability insurance, personal liability insurance, audit fees, land purchases or legal fees. Indirect costs may be included up to 15% of direct expenses. All salary and benefit line items will automatically populate from the personnel schedule (See second tab).					

Quarterly Projections

Personnel Schedule

Methodist Healthcare Ministries Personnel Schedule								
Budget Period: January 1, 2023 to December 31, 2023								
Organization Name:	ABC Organization							
Project Title:	ABC Project							
This tab is only required if Salaries and Benefits will be part of your MHM Request								
Name <i>List each name, if known.</i>	Position <i>List each position</i>	Justification <i>Provide an explanation of the proposed personnel's role.</i>	Computation <i>Show annual salary & fringe amounts & percent of time devoted to the project for each name/position. Enter whole numbers only for Salary and Fringe Benefits (no formulas or cents).</i>					
			Salary	Fringe Benefits <i>(FICA, Retirement, Health Insurance, etc.)</i>	Total Salaries & Fringe	% of Time on Grant <i>(MHM Portion)</i>	MHM Portion	Other Funding Sources
Juana Sanchez	Chief Operational Manager	Will oversee the day to day activities and over see the staff; attend presentations, regional meetings, and coordinate activities.	\$ 100,000.00	\$ 20,000.00	\$ 120,000.00	15%	\$ 18,000.00	\$ 102,000.00
TBD	Case Manager	Will perform daily activities of the project including presentations, fairs, meetings, disseminations of project, door to door visits, project reports. Estimated date of hire 4/1/2023.	\$ 50,000.00	\$ 5,000.00	\$ 55,000.00	25%	\$ 13,750.00	\$ 41,250.00
Total(s)					\$ 175,000.00		\$ 31,750.00	\$ 143,250.00

Notes for Budget Form

- Enter information only on yellow sections
- Enter whole numbers only
- Provide detail justification in areas indicated on the form
- Grant reimbursement is based on your approved budget
- If assistance is needed, please contact CommInvestments@mhm.org to format the budget form

Financial Reports Requested for Application

External Audits

- **Current Funded Partners:**
 - provide most recent Audited Financial Statements.
- **If you did not receive funding from MHM in 2022:**
 - provide two years of Audited Financial Statements

Interim Financials (Statement of Activities and Statement of Financial Position).

- Attach the most recent internal financials for fiscal year end and the most recent monthly financials at time of application submission.

Multi-Year Funding – Budget Details

Eligibility

Must be a current 2022 MHM funded partner in good standing.

Options

2 Years – January 1, 2023 – December 2024

3 Years – January 1, 2023 – December 2025

Multi-Year Budgets will have a tab per year should it be determined your organization is eligible to apply for more than one year of funding.



2023 Grant Monitoring

2023 Program Monitoring

Online Reporting

- Mid-year
- Year-end

In-person or Virtual Check-ins

- Scheduled by Program Officer in alignment with availability of funded organization
- Visit purpose will be communicated prior

Informal calls, emails, and check-ins, as needed

- MHM strives to be available for grantees throughout the grant year(s)
- Assigned Program Officer is available throughout the grant year for support

2023 Financial Monitoring

- **Financial Statements**

- Interim and Annual financial statements due year-end for multi-year awards

- **Grant Disbursements**

- Not automatic
- Monthly, quarterly, or advance based on grant application
- Supporting documentation includes general ledgers

- **Financial Audits**

- New Funded Partners audited 1st year
- Subsequent audits based on an annual assessment conducted by staff

Submission Assistance

It is MHM's intent to provide a mode of applying for funding that is equitable to all interested organizations that strategically align.



We value working with all organizational capacity types. If a section of the application process is challenging, we can offer support for a successful submission.

For technical assistance support, please email the team at: CommInvestments@mhm.org.

Questions

Resources

Website: www.mhm.org/grantmaking

- Grant Guidelines
- Frequently Asked Questions (FAQs)
- Convening PowerPoint Presentation
- Recording of Convening Presentation
- Documents and Resources Library
- Definitions

Email: CommInvestments@mhm.org

Thank you!