

Request for Proposals

Affordable Housing Initiative

Increasing Access to Private Market Units through Housing Choice (Section 8) Vouchers Proposals due July 23, 2014, at 5:00 p.m.

Meyer Memorial Trust (MMT) invites proposals that will increase Section 8 voucher holders' access to quality private market housing units in communities of their choice.

- **Type of Award:** Grant
- **Award Amount:** Up to \$75,000 (typical grant awards will range from \$5,000 to \$30,000)
- **Award Period:** One year
- **Funding available:** MMT anticipates awarding \$150,000 in grant funds this cycle

Background

Meyer Memorial Trust (MMT) believes that decent, safe and affordable housing is the foundation for personal stability, thriving families and strong communities. MMT's Affordable Housing Initiative (AHI) furthers this vision by investing in outcome-oriented, transformational strategies that will move the dial on affordable housing in Oregon in a meaningful way.

Affordable Housing Initiative

In 2007, MMT's Trustees selected access to affordable housing as a strategic focus for the foundation, and launched a five-year Affordable Housing Initiative to preserve and increase Oregon's supply of quality affordable housing while helping low-income renters to achieve stability and success. MMT awarded \$8.8 million in grants and program-related investments (PRIs) to 17 nonprofits during the five-year initiative. (For more information on the first five-year AHI, see <http://www.mmt.org/blog/affordable-housing-still-key>.)

In 2013, MMT's Trustees authorized a second five-year Affordable Housing Initiative, with approximately \$11 million in dedicated funding allocated for fiscal years (FY) 2015-19.

FY 15-19 AHI Framework

The funding framework for the second AHI focuses on three broad goal areas:

1. **Strengthening the Foundation:** Build on previous investments to strengthen the long-term health and sustainability of Oregon's existing affordable housing.
 - **Preservation:** Preserve federally subsidized rental units at risk of being lost.
 - **Rural housing:** Preserve rural owner-occupied manufactured homes.
2. **Fostering Innovation:** Catalyze innovative strategies to increase the availability of affordable housing and support residents' stability and success.

- **Cost efficiencies:** Develop models for creating and preserving affordable units as cost effectively as possible over the units' lifespan.
 - **Private market units:** Expand low-income renters' access to safe, decent, affordable housing through existing private market units.
 - **Systems alignment:** Support the stability and success of affordable housing residents by fostering strategic coordination between housing and other service systems.
3. **Securing the Future:** Develop resources and policies that will expand the availability of affordable housing into the future.
- **Advocacy:** Systems change and advocacy to increase the availability of affordable housing.
 - **Investment:** Explore innovative and opportunistic uses of PRIs, in amounts to be determined, to spur the development and preservation of affordable housing in under-served areas.

The funding opportunity described in this RFP is to support the goal of *Fostering Innovation – Private Market Units*.

Equity Lens

MMT is committed to a flourishing and equitable Oregon where all residents have fair access to opportunities to learn, work, prosper and reach their full potential. As part of this commitment, MMT is working to more deeply explore how to incorporate an equity lens into our internal operations and funding strategies.

The FY 15-19 Affordable Housing Initiative includes an explicit commitment to equity. All of the AHI's investments will be framed within an overarching equity lens with funding targeted to under-resourced communities, including communities of color, culturally-specific organizations and under-served rural communities.

The AHI offers an ideal opportunity for MMT to strengthen and sharpen our equity work by allowing us to explore and test out potential strategies for incorporating an equity lens into our funding strategies, data collection and shared learning. True to the collaborative nature of MMT, we will work with grantees and partners to explore emerging practices, challenges and barriers to help inform this work. We will use the AHI to test a range of potential strategies that will inform the MMT's long-term equity approach.

Evaluation and Shared Learning

The AHI aims to foster collective action and cooperative learning to promote innovation and advances in Oregon's affordable housing field. MMT will measure the impacts of its investments through data tracking and third-party evaluations to ensure the AHI's success. MMT will also support shared learning among grantees and stakeholders, engaging participants in identifying and responding to challenges, sharing successes and identifying promising approaches for extending and improving upon the AHI's work.

Additional Support

To maximize the impact of its investments, MMT will play an active role in the AHI's implementation as a convener. MMT will also work to leverage additional investments from local and national funders, promote shared learning and sponsor research and data collection to support the AHI's work.

The AHI's core investments will be supported by a companion pool of designated ancillary grant funds to help build the capacity and long-term sustainability of affordable housing organizations serving under-

resourced communities through technical assistance, training, operating support and strategic growth capital. The AHI's goals will also be furthered through complementary funding via MMT's Responsive Grant program.

For more information about the FY 15-19 AHI, see <http://www.mmt.org/blog/affordable-housing-initiative-next-five-years>.

Funding Opportunity Overview

Funding Awards

- **Type of Award:** Grant
- **Award Amount:** Up to \$75,000 (typical grant awards will range from \$5,000 to \$30,000)
- **Award Period:** One year

This funding opportunity will increase low-income renters' access to private market units by supporting successful implementation of recent reforms to Oregon's Housing Choice Voucher (Section 8) program.

As the largest affordable housing program in the United States, the Housing Choice Voucher program serves a vital role in connecting low-income tenants with access to housing and opportunity. Housing Choice Vouchers, commonly known as Section 8, are designed to enable low-income tenants to access private-market units in the community of their choice. In Oregon, the program's effectiveness has been limited by an Oregon law allowing landlords to refuse to rent to Section 8 voucher holders. As a result, some voucher holders are unable to find any landlords who will rent to them, while others are forced to settle for substandard units in low-opportunity neighborhoods.

On July 1, 2014, Oregon state law will no longer allow the denial of rental housing solely based on a tenant's use of a Section 8 voucher. The reform aims to increase access to housing options for low-income tenants using Section 8 vouchers.

To support successful implementation of the reform, MMT anticipates awarding \$150,000 in grant funds for demonstration projects, tools and replicable models that will increase Section 8 voucher holders' access to quality private market housing units in communities of their choice.

Examples of potential projects include (but are not limited to):

- Demonstration projects to support high-barrier and high-needs tenants in navigating the Section 8 process to increase their ability to secure suitable rental units. Ideally, these projects would include strategies to build relationships with private landlords in selected communities.
- Technical assistance, pilot projects and/or toolkits to support Public Housing Authorities (PHAs) to streamline inspections processes, reduce the inspection timeline, enhance the effectiveness of communications protocols and train administrative staff on new rules.
- Education and training for Section 8 tenants, especially new voucher holders, on process, rules, rights and responsibilities under the new law. Training and outreach could also be provided to social service providers who work with new and current voucher holders.
- Pilot projects, curricula, or tools to support PHAs, landlord associations, or other organizations to provide accurate information, training, and/or technical assistance to support implementation of the new law.

MMT aims to achieve the following outcomes through this investment:

- Significant numbers of Section 8 voucher holders in urban, suburban, and rural communities across Oregon will secure quality housing through the private market in communities of their choice.
- The pilot projects will contribute to increased understanding of the barriers that limit Section 8 voucher holders' access to private market units in urban, suburban and rural markets – and the best practices for addressing those barriers.
- The pilot projects will produce effective, replicable models and strategies that will be implemented more broadly after the end of the funding period, significantly increasing Oregon Section 8 voucher holders' access to housing into the future.
- Private market landlords and managers throughout the state will increase their involvement as partners in the Section 8 program.

Proposal Requirements

Eligible applicants

MMT is seeking proposals from organizations in Oregon that:

- Are tax-exempt as determined by the Internal Revenue Service. Examples of organizations we accept applications from include: 501(c)(3) nonprofit organizations, government entities, public and private educational organizations, Tribal governments, etc.
- Have a track record of effective work with Section 8 voucher holders, Public Housing Authorities, and/or private landlords
- Are well positioned to develop and implement pilot projects to support effective implementation of Section 8 reforms over the next year
- Are committed to increasing Section 8 voucher holders' access to private market units

In addition, all applicants must meet MMT's basic eligibility requirements (see <http://www.mmt.org/eligibility-requirements>).

If you have eligibility questions, please contact AHI Program Officer Elisa Harrigan (elisa@mmt.org, 503-228-5512). Optional informational sessions will take place on July 1 and July 8. Pre-registration information can be found [here](#).

Funding Criteria

Strong proposals will:

- Make a meaningful impact on the ability of Section 8 voucher holders to access quality private market units in the community of their choice.
- Increase housing access for Section 8 voucher holders who are people of color, residents of rural underserved communities, immigrants, and/or who experience high barriers in accessing housing.
- Promote partnerships and collaboration among local stakeholder organizations including Public Housing Authorities, private landlords, community-based organizations (including culturally-specific organizations where appropriate), and/or Section 8 voucher holders.
- Produce replicable pilot projects that can be implemented more broadly in the future.

Partnerships and Collaborations

MMT encourages partnerships and collaborative proposals that engage culturally-specific organizations and/or organizations representing rural, under-served communities in proposed projects. Partnerships should be structured to ensure that organizations representing under-served communities have a meaningful role in the project, receive a meaningful portion of the funding and have a significant voice in the project's leadership and decision-making.

Equity

As with all of MMT's Affordable Housing Initiative grants, this funding opportunity will be framed within an equity lens. Funding will be prioritized to applicants and projects that meaningfully address as many of the following equity components as are applicable to the proposed project:

1. Outcomes: How does the project benefit under-resourced communities, particularly low-income people of color and residents of under-served rural communities?
2. Partnerships and collaborations: Do culturally-specific and rural partners have genuine opportunities to inform, partner, and/or lead on the project?
3. Applicant organizations: What is the demographic composition of the applicant organization's staff and board? Does the applicant organization have an organizational equity policy/statement?
4. Project design: How did Section 8 voucher holders' needs, priorities and barriers inform the project's design?

In order to track how well we are meeting the AHI's equity objectives, we will gather data from applicants and grantees on each of the above issues. We aim to collect both quantitative and qualitative data to provide the most robust picture possible about how our funding is expanding opportunities and resources for underserved communities.

Shared Learning

Grantees will be expected to participate in a shared learning cohort to establish a common vision, projected outcomes, interim benchmarks and indicators of success. This shared framework will form the basis for ongoing monitoring, evaluation, and learning among grantees and partners. Grantees will also be expected to participate in a shared learning event shortly after the end of the grant period to present the findings from their projects with a broader group of stakeholders.

Evaluation

All grantees will be expected to measure and track quantitative and qualitative data on their projects' beneficiaries and outcomes, and to contribute to the overall evaluation of the AHI. MMT will provide assistance to organizations in developing evaluation strategies and metrics as needed, and we will work with grantees to minimize the administrative burden of the AHI's data collection and reporting requirements.

Application Process

- **Anticipated timeline:**
 - RFP issued: 6/23/14
 - Proposals due: 7/23/14
 - Award decisions: End of September
 - Funding will be available: October
- **Eligibility review:** Potential applicants are strongly encouraged to have a phone conversation with AHI Program Officer Elisa Harrigan (elisa@mmt.org, 503-228-5512) prior to completing the application, in order to determine whether the proposed project meets the funding opportunity's eligibility requirements.
- **Optional Information sessions:** Please pre-register for the informational sessions [here](#).
 - Date/Time: Tuesday, July 1, 2014 from 1:30-2:30pm
Format: In-person at Meyer Memorial Trust, 425 NW 10th Ave., Portland, OR 97209.
 - Date/Time: Tuesday, July 8, 2014 from 2:00-3:00pm
Format: Phone Conference, Call-in 1-800-550-3095. Conference ID 2132333182#
- **Technical assistance:** MMT is committed to providing technical assistance as needed to support applicants in participating in the RFP process. Please contact AHI Program Officer Elisa Harrigan (elisa@mmt.org, 503-228-5512) with any questions or requests for technical assistance.
- **Due diligence:** MMT is known for extensive due diligence performed during the grant review process. Applicants should anticipate follow-up questions and a possible site visit, as part of the grant review process.

Application Instructions

Online registration

Log in to the MMT GrantIS Application system (http://grants.mmt.org/gp_login.php) and complete or update your Organization Profile so that we have your organization's basic information on file.

Proposal narrative

Proposal narratives should be written on 8½ x 11 paper with one-inch margins, 12 point font, and should not exceed 10 pages. (The budget and required attachments do not count toward the 10-page limit.) Proposals should address the following questions:

Project summary

- What is the project's purpose and goals?
- How will the project increase Section 8 voucher holders' access to quality private market units?
- What strategies and activities will be employed to achieve the project's goals?
- What are the project's anticipated outcomes and deliverables?
- What is the project timeline?

Applicant organization

- Briefly summarize the applicant organization's purpose, mission, history, major programs and activities
- What are the applicant organization's qualifications to lead this project, including those of the project's lead staff?
- Does the applicant organization have equity policies in place and/or does it incorporate an equity lens into its work? If so, please provide a brief explanation and/or attach any written policies.
- Use the demographic data survey available at http://www.mmt.org/sites/default/files/MMT_AHI_Demographic_Data_Survey_Form.xlsx to describe the demographic diversity of your organization's staff, board and volunteers. If you feel the chart does not fully capture the diversity of your organization, please provide further explanation in narrative form.

Project beneficiaries

- Identify and describe the geographic area(s) and/or target population(s) that are expected to benefit from your project.
- How will the pilot project increase housing access for Section 8 holders who are people of color, residents of under-served rural communities, immigrants, and/or people with high barriers to accessing rental housing?

Community involvement

- Who are the project's main stakeholders, and how have you involved stakeholders in defining the issue and developing your proposed project or strategy?

Partnerships and collaborations

- Describe any partners who will be involved in the project design and/or implementation, including their roles and responsibilities, how their involvement will contribute to the success of the project and how they will benefit from involvement in the project.
- If any partners will play a significant role, including receiving grant funds for this project, please provide an executed partnership agreement or a signed letter of commitment describing the partnership, including the roles of each partner, how grant funds will be shared among partners, and the financial or in-kind contributions of each partner.

Evaluation

- How will you know that your work is successful?
- How will you track and measure your progress in meeting your stated goals?

Project Sustainability

- Explain how the project will be sustained after the funding period, if applicable.
- How will your project model and results be documented to support broader dissemination? Are there ways that you can support replication (by your organization, your network, and/or other organizations throughout the state) of the models and strategies that you develop through this project?

Budget

Provide a project budget that includes:

- A line-item breakdown of all project expenses
- A line item description briefly describing each line item
- The amount of funding requested from MMT for each line item
- A brief description of any additional revenue sources for the project (secured or pending), including the funding source and amount (if applicable)

A sample budget worksheet is available at [http://www.mmt.org/sites/default/files/AHI RFP-budget template.xlsx](http://www.mmt.org/sites/default/files/AHI_RFP-budget_template.xlsx). You may use that worksheet or your own format, whichever you prefer.

The budget does not count toward the narrative proposal page limit.

Attachments

Please attach the following documents to your email proposal submission. Attachments do not count toward the narrative proposal page limit:

- Applicant organization's current fiscal year budget
- Demographic data survey (available at [http://www.mmt.org/sites/default/files/MMT AHI Demographic Data Survey Form.xlsx](http://www.mmt.org/sites/default/files/MMT_AHI_Demographic_Data_Survey_Form.xlsx))
- Partnership agreements or letters of commitment (if applicable)

Submission Instructions

- **Online registration:** Log in to the MMT GrantIS Application system (http://grants.mmt.org/gp_login.php) and complete or update your Organization Profile.
 - **Application forms:** The RFP instructions, demographic data survey form, and project budget template can be found in the MMT GrantIS Application System (http://grants.mmt.org/gp_login.php) and also on the Trust's website at <http://www.mmt.org/program/rfp>
 - **Application submission:** All application materials should be submitted via e-mail to rfp@mmt.org. Please note "AHI – Private Market Units" in the subject line.
 - **Deadline:** July 23, 2014 at 5:00 p.m.
 - **Need help?** If you need assistance with the online registration application process, contact MMT's grants administration department at grantsadmin@mmt.org or call 503-228-5512. If you have a question about your proposal, contact AHI Program Officer Elisa Harrigan (elisa@mmt.org, 503-228-5512).
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