

GRANTS AND PROGRAM RELATED INVESTMENTS

APRIL 17, 2013



Meyer Memorial Trust






MMT MISSION

We work with and invest in organizations, communities, ideas, and efforts that contribute to a flourishing and equitable Oregon.

Meyer Memorial Trust's website


Go to: www.mmt.org/apply



Meyer Memorial Trust

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Funding Opportunities

Meyer Memorial Trust looks for opportunities to invest in people, ideas and efforts that deliver significant social benefits to Oregon and Clark County, Washington. We do that through our grant programs, loans and initiatives. Read the guidelines for our grant and loan programs and overviews of our initiatives that summarize what, why, how, who, when and where they operate.



Grants	Loans	Initiatives
Grant programs designed to respond to important community needs and strengthen nonprofits Learn More	Low interest loans and other program-related investments that advance charitable work Learn More	Strategies to address some of the most pressing and intractable issues in our region Learn More

Which MMT program meets your needs?

Use our Funding Finder tool to help you identify the MMT program that's the best fit for your organization's needs.
[Go](#)

Have you done your homework?

After you study the guidelines for the program that's the best fit, visit our Help Desk to ensure you know what we're looking for.
[Go](#)

Ready to apply for a grant or loan?

Head straight to [GrantIS](#), our online application system, register your organization, fill out and submit an application.
[Go](#)

[Awards Database](#)[Funding Finder](#)[GrantIS](#)

RELATED NEWS

Looking for a Big Lift

Before even cracking a page, I was pretty sure I knew the answer to the question posed in the title of the new report, The Public Funding Crisis: Can Philanthropy Shoulder the Burden? Nevertheless, I thought it might contain some nuggets of wisdom. Turns out, it did—
[READ MORE](#)

[More Funding News](#)

LATEST CEO MESSAGE


Working Toward Equity in Oregon

Today we join others in disseminating a report from Multnomah County's Coalition of Communities of Color that addresses the relationships among foundations and communities of color in Oregon. [READ MORE](#)

[More CEO Messages](#)

MISSION INVESTORS EXCHANGE - WWW.MISSIONINVESTORS.ORG

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**Your Road to
Mission Investing**
for Community Foundations

Your Road to Mission Investing, our new portal for Community Foundations	Our second publication: a primer for investing in India
For mission investing beginners: Explore PRIs (program-related investments)	Essential reading for the mission investing practitioner

Featured Tool

Test Foundation - Green Investment - Investing Mutual Fund

INVESTOR: [Test Foundation](#)
Investor: Test Foundation
Investment Amount: \$1,000,000

INVESTMENT: [Green Investment](#)
Investment: Green Investment
Investment Amount: \$1,000,000

Mission Investment Database

What is the Investment Database

What's New in Mission Investing

Clif Bar Family Foundation makes its first PRI with Bard College MBA in Sustainability

March 4, 2013 - The Clif Bar Family Foundation made a \$100,000

HERON MISSION-RELATED INVESTMENTS CONTINUUM

MISSION-RELATED INVESTMENT OPPORTUNITY CONTINUUM



MMT OVERVIEW

<u>Date</u>	<u>Total Assets</u>
1982	\$126.2M
2012	\$659.4M (March 31, 2012)

Total # of Awards: 6,960

Totaling: \$567.8M

FY12 Awards

All Programs & Initiatives: 344 Grants & 5 PRI's

Totaling: \$31.4M

HISTORICAL PROGRAM HIGHLIGHTS

As of November 30, 2012:

PRIs Approved	\$43.8 M
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PRIs Paid	\$35.6 M
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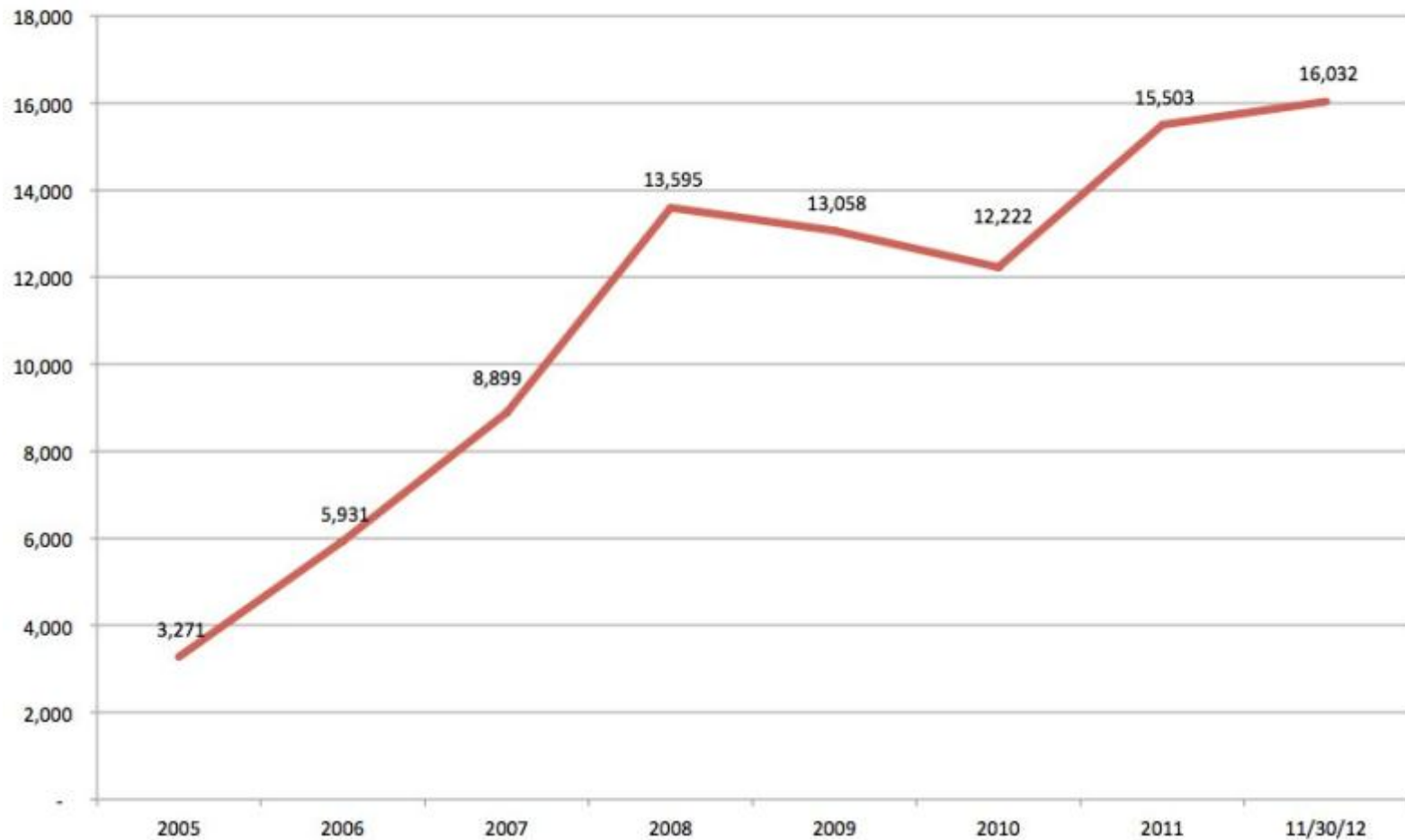
* total lifetime cancelations of PRI's that were never paid, \$6.2 M

PRIs Repaid/Commitments Met	\$19.1 M
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* one PRI was never repaid totaling \$476,000

5 YEAR PRI GROWTH

**Outstanding PRI Balance
Dollars in Thousands**



MMT WORKING WITH THE BANKING COMMUNITY

- **Types of Projects**

- CDFIs - Craft3, Network for Oregon Affordable Housing (NOAH)
- Construction - housing, community facilities
- Refinances
- Programs - LIHTC, NMTC, conventional (construction loan, permanent loan), SNAP Bond

- **Types of Capital - Grants and PRIs**

- Reduce commercial loan amount
- Blend/reduce interest rate on loans
- Co-lending
- Subordinated debt

ORGANIZATION UNDERWRITING

- Board Governance
- Management Staffing and Personnel
- Planning
- Programs
- Finances

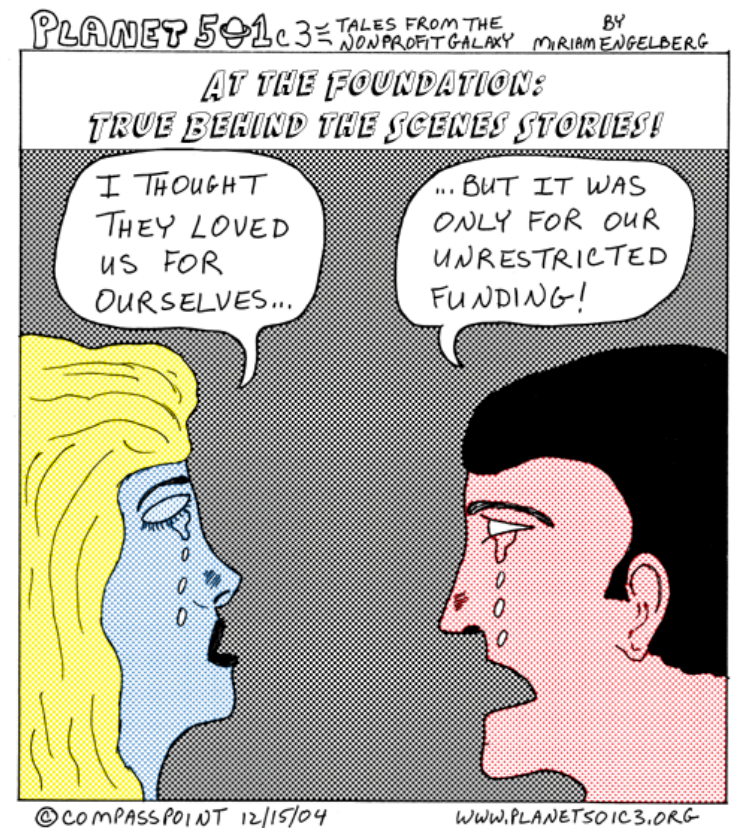
SPEED BUMP

Dave Coverly



PROJECT/PROGRAM UNDERWRITING

- **Alignment with MMT's values and interests**
- **Alignment with organization's plans**
- **Operations/budget/proforma**
- **Sustainability**
- **Specific repayment plan – total timeframe, payment amounts, sources, collateral, other backup**



FINANCIAL UNDERWRITING

Has organization planned for and raised sufficient operating and capital resources to support current and future needs?

Does organization employ accounting and financial record keeping practices that safeguard resources and produce accurate, timely records for operations and program services?

Are liquid assets and reserves sufficient to sustain the organization?