

MEYER FOUNDATION | 2020

# Grants Guide

Version: 1.2

Updated: January 27, 2020



# Contents

- The Meyer Foundation Grants Guide .....2
- What Systems Does Meyer Seek to Change?.....2
- What Type of Work Does Meyer Support?.....3
- What Does Meyer Seek in Grantee Partners?.....4
- What Types of Grants Does Meyer Make? .....4
- Who is Eligible to Apply for a Grant? .....5
- How Does My Organization Apply for a Grant? .....6
- What Do I Need to Know About Meyer’s Online Application Portal?.....6
- What Does Meyer Look for When Reviewing Interest Forms and Proposals? .....7
- When Does Meyer Award Grants? .....9
- When Should My Organization Submit Our Interest Form?.....9
- Appendix A: Interest Form .....11
- What Do We Need to Submit an Interest Form? .....11
- Appendix B: Proposal.....12
- What Do We Need to Submit a Proposal? .....12
- Appendix C: Progress Indicator Summary .....20

# The Meyer Foundation Grants Guide

---

The Meyer Foundation envisions a just, connected and inclusive Greater Washington region in which systemic racism and its consequences no longer exist. We pursue and invest in solutions that build an equitable Greater Washington community in which economically disadvantaged people thrive.

We apply a systems approach to achieve a just, connected, and inclusive Greater Washington. This means our work and the work we support seeks to:

- Address the root causes of racial disparities in housing, education, and economic well-being.
- Shift the conditions, policies, practices, priorities, culture, and power to create systems that are equitable and inclusive.
- Build the power and leadership of the people most directly affected by inequity based on the unique context of their experiences.

This Grants Guide covers all aspects of applying to the Meyer Foundation for a grant, including the types of organizations and work the Foundation supports, what we look for in funding requests, and how and when to apply. This comprehensive guide consolidates information about Meyer's grantmaking and application processes that in the past appeared in different parts of our [website](#) and is intended to be a helpful tool. We also encourage you to explore our website which further describes the full scope of Meyer's work in the region, and [Frequently Asked Questions](#) which provide additional details about our work.

## What Systems Does Meyer Seek to Change?

Meyer is focused on reimagining, recreating, and reforming three key systems that are the bedrock of a thriving region:

**Housing.** We envision equitable and inclusive neighborhoods in which development creates a steady supply of high-quality housing that is affordable and is located close to resources, amenities, and opportunities.

**Education.** We envision a regional education system that works for everyone by providing the funding and resources to create equitable and inclusive schools with welcoming, supportive climates that are free of bias and discrimination, and prepare students for college, career, and life.

**Economic Well-Being.** We envision a regional economy in which systemic barriers for people of color to earn, grow, and preserve the financial assets of their families and communities have been removed.

In 2020, we will also give priority to funding organizations that:

- Build multi-generational movements through supporting youth power and voice.
- Work to guarantee full and equal participation in our democracy.
- Pursue policies and systems change to eliminate the cost of poverty.

## What Type of Work Does Meyer Support?

Meyer seeks to partner with organizations that work to make systems equitable and inclusive.

These systems change tactics are examples of the types of work Meyer supports but the list is not exhaustive. We may support other types of work if it contributes to making our region’s housing and neighborhoods, education systems, and/or economy more inclusive and equitable.

Research and data	Strategic communications
Convenings	Practice improvement
Training and technical assistance	Promising practices
Building coalitions	Mobilizing stakeholders
Policy analysis and advocacy	Ensuring accountability
Legal support and litigation	Base building
Civic engagement	Leadership development

We don’t expect each organization to incorporate all of these tactics. In fact, we recognize that systems change work has the best chance of succeeding when organizations, partnerships, coalitions, and networks apply a mix of these strategies and tactics based on what’s most responsive to your constituents and the circumstances they face.

We generally **do not support direct services** unless the services are part of an advocacy or organizing agenda or a clear strategy to change systems.

### The Meyer Foundation Does Not Fund:

- Visual and performing arts
- Access to health care
- Environment
- Capital for housing construction or development
- Start-up and operating support for housing developers
- Hunger relief and nutrition
- Scholarships or financial assistance
- Individual public, public charter, or private schools
- Individuals (including scholarships and emergency assistance)
- Medical or scientific research
- Programs that promote religious doctrine
- PTAs

- Special events or conferences, except by invitation only
- Endowments
- Direct services, unless the services are part of an advocacy or organizing agenda or a clear strategy to make systems equitable and inclusive.

## What Does Meyer Seek in Grantee Partners?

Meyer seeks to partner with organizations that apply a systems approach to their work. Your organization is a good candidate to apply for funding from the Meyer Foundation if you:

- Address the root causes of racial disparities in housing, education, and/or economic well-being.
- Have a strong analysis of the systemic barriers to racial equity your constituents face and reflect that analysis in your goals, strategies, and work.
- Are led by and centered on people of color.
- Build and share power and leadership with your constituents by actively engaging them in decision-making.
- Actively collaborate with others to make systems in the Greater Washington region equitable and inclusive.
- Have identified specific opportunities to advance systems toward racial justice and equity. We are looking for efforts that have the potential to significantly improve the lives of people of color in housing, education, and economic well-being and for improvements that will benefit not only your current constituents but also future generations.

### Why do we use the term *constituents*?

The term “constituents” refers to the people most directly impacted by the systems your organization’s work seeks to change. Your constituents have the most to gain or lose from the outcomes of your work. Using this term rather than clients, participants, or beneficiaries is intended to communicate the knowledge, power, and value of those most affected by inequities in housing, education, and economic well-being; and recognizes the need for their leadership to create lasting change.

## What Types of Grants Does Meyer Make?

Meyer awards one year and multi-year grants for general operations, programs/projects (including, in a limited number of circumstances, for capital campaigns), and capacity building. Meyer’s primary grantmaking strategy is to provide **general operating support**. We may award a small number of project-specific grants in circumstances in which a particular project aligns with Meyer’s goals, but the overall work of the organization does not.

## Multi-Year Grants

Organizations that are good candidates for multi-year support (usually three years) will embody the systems approach described above. In addition, we are especially interested in supporting the following:

- Anchor organizations forming multi-stakeholder coalitions to align efforts to change policies and institutions that perpetuate racial inequity;
- Coalitions working on multi-year campaigns addressing the priorities and/or concerns identified by their constituents;
- Organizations with a proven track record of building the leadership and ability to act of people of color directly impacted by the issue(s) being addressed;
- Emerging organizations that have demonstrated promising ideas and/or fill a critical gap in movements to shift systems toward equity in housing, education, and/or economic well-being.

## Capacity-Building Grants

We limit our capacity-building grants to organizations that have received program and operating support from Meyer in the previous two years. You can learn more about these grants in the [Capacity- Building Grants Guide](#).

## Who is Eligible to Apply for a Grant?

To apply for a grant from the Meyer Foundation, applicants should:

- Be a nonprofit organization with a 501(c)(3) public charity designation by the IRS (or be fiscally sponsored by one) and,
- Work with and for the people and communities of the Greater Washington region, which Meyer defines as:
  - Washington, DC
  - Montgomery and/or Prince George's counties, Maryland
  - Arlington, Fairfax, and/or Prince William counties, Virginia
  - The cities of Alexandria, Fairfax, Fairfax City, Falls Church, Manassas, and/or Manassas Park, Virginia

Most of the organizations Meyer supports are local organizations based in and carrying out their work in the Greater Washington region. If you work for a national or statewide organization that wants to apply to Meyer, we will consider your request if your work is strongly aligned with Meyer's goals and priorities, takes place in the Greater Washington region, and is done in close partnership with local communities and organizations.

If your organization is not yet a 501c3 or does not yet have fiscal sponsor, you are welcome to apply while you are securing that designation. Grants can only be made to verified public charities.

## How Does My Organization Apply for a Grant?

**Step 1: Read our Grants Guide.** This comprehensive guide consolidates information about our grantmaking and application processes, including: Meyer’s goals and funding priorities, what we look for in grantee partners, what information we ask you to submit when you apply (and why we ask you to submit it), and how we evaluate funding requests.

**Step 2: Submit an [Interest Form](#).** The Interest Form helps us learn about your work and takes about 30 minutes to complete. There are no deadlines to submit Interest Forms: we accept and review them year-round. We’ll let you know within 30 days of submitting the Interest Form whether we will consider it for funding and invite you to submit a proposal. *All applicants, including current or previous grantee partners, will need to have an online account in our new grantmaking platform before they are able to submit an Interest Form.*

**Step 3: If invited, submit a proposal.** The questions on the proposal help us understand whether your work takes [a systems approach](#): addresses root causes, seeks to change an inequitable system, and builds leadership in communities. We award grants four times a year – April, July, September, November – and generally issue award letters and grant checks two to three weeks after we’ve approved the grant.

## What Do I Need to Know About Meyer’s Online Application Portal?

In late 2019, Meyer migrated to a new technology platform to manage all aspects of our grantmaking. Hosted by GivingData, our new portal is compliant with every browser (Chrome, Firefox, and Safari are recommended) and works on both desktop and mobile devices. The system is also more reliable and secure. For example, your work will automatically be saved every 30 seconds. We hope you will find it intuitive to use and very reliable.

**All users will need to register and activate an account in the system in order to submit an Interest Form.** In addition, all grantees will now submit their grant reports via GivingData. If needed, you can access detailed instructions about account setup and navigating the new grantee portal [here](#).

To return to a submitted Interest Form, follow <https://meyer-portal.givingdata.com/campaign/interestform>

To view in progress or submitted proposals or reports, follow <https://meyer-portal.givingdata.com>

## What Does Meyer Look for When Reviewing Interest Forms and Proposals?

The most important thing to know is that Meyer does not evaluate Interest Forms or proposals based on grammar, sentence structure, or how well written your Interest Form or proposal is.

### Interest Forms

In evaluating Interest Forms, we look at:

**Alignment on goals:** How well does your organization’s work align with Meyer’s goals to make systems that contribute to housing, education, and economic well-being equitable and inclusive?

**Building power and leadership:** To what extent is your organization or project led by and build and support the leadership and power of those closest to the issues and most affected by racial inequities?

**Movement building:** How does your organization’s work contribute to broader work in DC, Maryland, or Virginia to make housing, education, and/or economic systems more equitable and inclusive?

### Proposals

In evaluating proposals, we assess organizations on the seven factors listed below and consider whether, on each of the factors, the organization is very strong, moderately strong, not strong, or demonstrates no evidence based on the materials submitted and any follow-up inquiries we make.

It’s important to keep in mind that this is a long and comprehensive list. Even strong organizations whose work is well-aligned with Meyer’s goals will not necessarily score “very strong” on each of the factors listed below. And because of our own budget constraints, even organizations that score “very strong” on most of the factors listed below may not receive funding.

#### Alignment with Meyer’s Strategies and Goals

- How does your organization’s work or project align with Meyer’s strategies and goals?

- Is your organization led by people of color?
- Is your strategy centered on people of color?

### Contributions to Movements

- How does your organization contribute to movements for racial equity in housing, education, or economic well-being in your neighborhood, city, county, and/or state?
- Is your organization identified as a partner by other organizations?
- Does your organization fill a gap?

### Systems and Race Analysis

- How well does your organization understand how race, class, and identity play into the power dynamics of the systems you seek to change?
- Do your organization's constituents represent the people and communities most adversely affected by the issues on which you work?

### Systems Change Strategy

- Are your organization's strategies and tactics based on the primary concerns voiced by your constituents?
- Does your organization's strategy identify racial equity/justice as critical for achieving your organizational goals?

### Constituent Engagement and Leadership

- Are your organization's strategies and tactics co-created with and carried out by constituents?
- Does your organization have a defined process for developing constituent leadership by incrementally building skills over time?
- Does your organization's constituent leadership as well as your board and senior staff represent the diversity and experiences of the community and does your work center those who are most directly affected by the issues being addressed?

### Commitment to Movement and/or Field Building

- Has your organization identified other stakeholders with similar goals, including those with complementary knowledge and skills, with which you could collaborate?
- Does your organization's strategy articulate community and/or institutional organizing as a strategy for achieving your racial equity goals?
- Does your organization belong to and/or actively work with local, national, regional, and/or state organizing network(s) or collective action initiatives?

### Potential for Impact

- Does your organization have relationships with both the people within the system(s) you are trying to change and with the people in the communities affected by the system?
- Is your organization's strategy centered on people of color?
- Does your organization's budget and current and prospective funding appear to be both realistic and adequate to fund the proposed work?
- Does the proposed work represent a key opportunity for likely change at this moment in time?

## When Does Meyer Award Grants?

For 2020, the Meyer Foundation will make grant decisions in April, July, September, and November. This is more frequent than our recent practice of awarding grants twice per year and we hope it will be more helpful and responsive to the needs of our grantee partners.

## When Should My Organization Submit Our Interest Form?

Meyer accepts and reviews [Interest Forms](#) on a rolling basis and awards grants in April, July, September, and November. Generally, we recommend that you apply when it makes the most sense for your organization, depending on when your fiscal year begins and ends, what your fundraising plan is, and when your staff is able to submit the request.

Typically, the process from submission of Interest Form through grant approval takes 12-15 weeks.

**For Current Grantee Partners:** You should submit your Interest Form whenever it makes the most sense for your organization, regardless of when you received a grant in 2019. If you have questions about the timing of your submission, please contact your Partnerships and Strategy Director.

### Are There Set Proposal Deadlines?

If you are invited to submit a proposal, we typically give three weeks before the proposal is due. Because we are using a rolling process, we do have some flexibility on deadlines and can work with you to find a deadline that works for your organization.

### Need Help?

If you have questions while you are working on your Interest Form or proposal, we are here to answer them.

While the most detailed information about our application process is covered in this guide, the following resources may be helpful to you.

- The [FAQs on our website](#).
- Webinars. Meyer staff occasionally host webinars that cover how to apply for a grant, what we are looking for in potential partners, and answer some frequently asked questions. We share upcoming webinar dates on our social media and the recordings of these webinars are made available on the website shortly after they take place.
- Send us an email at [apply@meyerfnd.org](mailto:apply@meyerfnd.org).
- Submit questions directly through your in-progress proposal. You'll see the dialogue box on the right side of the proposal form.
- Contact your [Partnerships and Strategy Director](#).

### Tips for Submitting an Interest Form or Proposal

**Feel free to use bullet points as you answer questions.** It's not necessary to compose a narrative response to each question.

**Focus on highlights.** We are looking for an introduction to your organization in the Interest Form and an overview of your organization's work in the proposal. We don't expect you to describe every aspect of your organization's or project's work.

**Be clear and concise.** Don't feel obliged to write the maximum 400 words when you describe your work to us in the Interest Form or answer proposal questions. We don't consider the length of responses in evaluating how well a request aligns with our goals and funding priorities. We don't penalize organizations that submit concise responses that are less than 400 words!

**Explain how your work contributes to making systems in housing, education, and economic-well-being equitable and inclusive.** Your initial description of "your idea" should demonstrate how your organization's or project's goals and objectives align with the Meyer Foundation's goal areas, commitment to advancing racial equity, and approach to systems change.

**Recycle language.** We recognize that in working to change systems, your analysis of inequitable structures and disparities may not change significantly from year to year. If you've been funded by Meyer in the past, please feel free to copy and paste into your Interest Form or proposal the responses you've created for previous applications, as long as they are up to date. Please do not feel it is necessary to re-word information that remains accurate.

# Appendix A: Interest Form

---

## What Do We Need to Submit an Interest Form?

The key information you will need to submit an Interest Form is listed below so you can gather the necessary materials before you log in to the application portal.

### Your Organization's Information

- Organization's legal name (and name it's commonly known by)
- Address, telephone number, website, and social media handles
- Federal tax identification number (if you have one)
- Fiscal sponsor's name (if applicable)
- Is your organization Black, Latino/a/x, or otherwise people of color-led, which we define as:
  - Executive Director self-identifies as a person of color
  - Most of organization's senior leaders self-identify as people of color
  - Board chair self-identifies as a person of color
  - Most board members self-identify as people of color
  - None of the above
  - Unknown/Don't Know

### Your Contact information

- Interest Form Contact: Name, title, telephone number, email
- Organization Chief Executive Contact: Name, title, telephone number, email

### The Proposed Work

- Tell us about how the proposed work will advance racial equity through systems change.

*What are we looking for?* We want to know how your work will make systems more equitable and inclusive. We define systems change as the process of shifting the conditions (policies, practices, institutions, culture, and power) that hold a problem in place – in this case, the systems in housing, education and economic well-being that have advantaged white people and disadvantaged people of color.

*Why are we asking?* Meyer supports work focused on housing, education, and/or economic well-being in the Greater Washington region. We want to know how your work aligns with our goals.

We recommend responding in 100 to 300 words. Feel free to use bullet points.

### Where will the work take place? Please select up to 8.

District of Columbia

- Wards 1-8

Maryland

- Montgomery County Districts 1-5, Prince George's County Districts 1-9

## Virginia

- Alexandria City
- Arlington County
- Fairfax/Falls Church - Mason, Braddock, Dranesville, Hunter Mill, Lee, Mount Vernon, Providence, Springfield, Sully, City of Falls Church, Fairfax City
- Greater Prince William - Brentsville, Coles, Potomac, Gainesville, Neabsco, Occoquan, Woodbridge, Manassas City, Manassas Park
- Greater Washington region

- On which Meyer Foundation goal(s) is your work primarily focused?  
Select up to three from: Education, Housing, Economic Well-Being
- Requested Amount

We encourage you to ask for the amount your organization needs. You won't be penalized for asking for too much, but if you are invited to submit a proposal, your Partnerships and Strategy Director will discuss the size and length of the grant you should request in your proposal. Our typical grants range from \$10-60,000 per year and the median grant size is \$40,000 per year.

- Estimated Term of Grant (in months)

What are we looking for? The number of months (12 to 36) over which you propose to do the work.

## Appendix B: Proposal

---

### What Do We Need to Submit a Proposal?

We've listed below all of the questions we ask in our proposal, along with an explanation of why we are asking each question and what we hope to learn from your answers. You can also [download a Microsoft Word document](#) with the questions below so that you can draft your responses, then cut-and-paste into the online form.

The proposal questions are designed to help you expand on your plan to make systems in housing, education, and economic well-being more equitable and inclusive. Your answers will help us understand your work and determine how well it aligns with our strategy and funding priorities.

We know that the work of systems change can be unpredictable and characterized by trial and error. We want to understand what you intend to do; however, we also understand that as you implement those plans you may end up modifying your approach and tactics depending on a variety of factors. You may face unexpected changes within your organization, among your partners, in the context in which you work (and over which you have little control), all of which may affect whether what you're

doing is gaining traction. Because of this unpredictability, we will not evaluate the future of our partnership based on whether you complete everything you specify here.

### Alternatives to Meyer's Written Proposal Questions

In lieu of responding to the narrative proposal questions in the online form, you may either:

1. **Submit a proposal you've developed for another funder that addresses all required questions.** Attach an existing proposal you feel adequately addresses the questions on Meyer's proposal. It should be no longer than 12 pages and there is no need to customize it for Meyer. Upload the document to the **Optional Attachments** page at the end of the online form. Then, in each of the response boxes on the Meyer proposal, please reference the page number and paragraph from your attached document that provides your answer to the online question.

OR

2. **Submit video or audio responses.** Record video or audio responses to each question and upload them to YouTube, Vimeo, SoundCloud, or a platform of your choice, and provide links in each of the response boxes on the proposal. Please record a separate response for each question. We're not looking for perfection or professional quality audio or video. But please review your recordings to ensure that a listener will be able to clearly hear your responses and that there is little background noise or interference. We recommend a response of 100-400 words for most of our narrative questions. For audio or video recordings, this will typically be a 1-3-minute recording. A 250-word response will be a bit under two minutes.

### Your Organization's Information

- Organization's legal name (and name it's commonly known by)
- Federal tax identification number
- Address, telephone number, website

### Your Contact information

- Request Contact: Name, title, telephone number, email
- Organization Chief Executive Contact: Name, title, telephone number, email

### Fiscal Sponsorship Information (if applicable)

If your organization uses a fiscal sponsor, please complete the following information about the sponsoring organization:

- Fiscal Sponsor Name
- Fiscal Sponsor Federal Tax Identification Number
- Fiscal Sponsor Address
- Fiscal Sponsor Request Contact (if different): Name, title, telephone number, email
- Please upload current documentation of the fiscal sponsor relationship. This can be a Memorandum of Understanding or a current letter from the sponsor documenting the sponsorship terms.

## Your Request

- Request amount
- Estimated term of grant (In months)
- Type of support requested. Please select either: General operating support or Program/project support

## Proposal Narrative Questions

In answering each of these questions, feel free to use bullet points. It's not necessary to compose a narrative response to each question.

### PEOPLE AND COMMUNITIES | Who are the people and communities your organization or project works with and for?

*What are we looking for?* A clear and accurate profile of the individuals and communities you work with that does not focus solely on their weaknesses or deficits. Please include information on:

- the demographics of the individuals and communities;
- some of their shared life experiences; and
- their strengths and their concerns

*Why are we asking?* We want to understand who your organization works with and the profile of the individuals and communities most adversely affected by racial inequities in the issue areas in which you work.

We recommend responding in 100 to 400 words.

### CONSTITUENT INVOLVEMENT | How are your constituents involved in creating and implementing the work you propose to do?

*What are we looking for?* We want to understand how your organization prioritizes and approaches building leadership and power in your constituent base, as well as how engaged constituents are in making decisions about your strategies, tactics, policies, and campaigns. As part of your response, please include information on:

- how your constituents are represented among your staff, board, and volunteers;
- if applicable, how many of them are in management positions; and
- how your constituents are involved in decision-making.

*Why are we asking?* We seek to partner with organizations who build power and follow the leadership of their constituents, and who prioritize hiring and appointing staff, board, and volunteers that are members of their constituency or have direct life experience with the issues the organization's constituents face.

We recommend responding in 100 to 400 words.

### SYSTEMS CHANGE GOALS AND SOLUTIONS | What are your specific systems change goals and what solutions are you working toward?

*What are we looking for?* Please tell us:

- the specific systems, institutions, policies, culture, and/or practices you're attempting to influence;
- why challenging these systems, institutions, policies, culture, and/or practices is important to your constituent base; and
- how these challenges contribute to racial equity or inequity in the Meyer-identified goal areas you've selected.

In naming potential solutions, we are looking for specific, current, and winnable targets or proposals for change.

*Why are we asking?* We want to understand the landscape of the systems that create and maintain racial disparities that make it more difficult for your constituents to thrive. We also want to understand the specific changes that seem attainable at this moment in time and that hold potential for building support and engagement toward your ultimate goals to make systems equitable and inclusive.

We recommend responding in 100 to 400 words.

**SYSTEMS CHANGE TACTICS | From the list below, please select one to four tactics your organization will primarily use to advance your goals.**

**Research and data:** conduct research and release findings to the public related to racial equity in the Greater Washington region.

**Strategic communications:** undertake communications campaigns aimed at promoting systems change in housing, education, and/or economic well-being and at making racial equity a publicly-held value.

**Convenings:** bring together stakeholders to build trust and get real-time feedback from people most affected by racial inequities. *(Please note that Meyer generally supports convenings when they are part of a broader strategy or plan to change systems and not as a stand-alone piece of work.)*

**Practice improvement:** evaluate current practices of specific organizations and institutions (such as government agencies) and develop communications messages and a plan to make that institution's practices equitable and inclusive.

**Training and technical assistance:** provide training and technical assistance to organizations and institutions on how to make their programs and their operations equitable and inclusive.

**Promising practices:** create case studies that highlight promising practices (locally, regionally, or nationally) that lead to improved outcomes and racial equity in housing, education, and/or economic well-being and release those case studies to the public.

**Building coalitions:** build alliances of individuals and/or organizations with shared interests and goals and work together to design and implement collective strategies that will drive change.

**Mobilizing stakeholders:** bring together – through community organizing, education, or advocacy training – communities most adversely affected by racial inequity and activate them to work collaboratively to drive policy change.

**Policy analysis and advocacy:** address an injustice or create systemic social change by analyzing and changing laws and regulations or how those laws and regulations are interpreted or applied. Activities can include conducting policy research, meeting with reporters, educating the public, lobbying a legislator, meeting with a government regulator, filing a lawsuit, or registering and mobilizing voters.

**Legal support and litigation:** work through the judicial system to challenge and change policies and practices that are more likely to adversely affect large numbers of people based on their racial identity.

**Base building:** organize and educate constituents to understand the source of their social, political, or economic problems and build their collective power to address these issues.

**Civic engagement:** organize and educate constituents to participate in institutions and political processes (including elections) to promote racial equity and to change systems at the local, state, and national level.

**Leadership development:** develop the skills, confidence, and overall capacity of people and communities most adversely affected by racial inequities to become effective advocates for racial justice and equity.

*What are we looking for?* We want to understand your approach and plan to carrying out your work.

*Why are we asking?* We want to understand how the tactics you propose are connected to the goals and systemic issues you identified previously in this proposal.

If the Meyer Foundation awards your organization a grant, future grants and partnerships will not depend on your use of the same tactics year after year. We understand that the tactics you deploy may change depending on the progress you make. We are looking more broadly to understand your approach and plan, and we recognize it may evolve over time.

**PLANNED ACTIVITIES | What are some specific examples of activities you are planning for each tactic selected above?**

*What are we looking for?* For each tactic identified above, please describe key activities you will undertake during the grant period.

*Why are we asking?* We want to understand in more detail how your organization works to advance racial equity and address the issues of systemic racism that impact your constituents.

If the Meyer Foundation awards your organization a grant, future grants and partnerships will not depend on your completing every activity you specify here. We are looking more broadly to understand your approach and plan, and we recognize it may evolve over time.

We recommend responding in 100 to 400 words.

### PROGRESS INDICATORS | How will you know if your systems change efforts are making progress toward achieving racial equity?

From the list below, please select up to five types of progress indicators your organization currently tracks or proposes to track. For more information about and definitions of the progress indicators, see [Appendix C](#) of this Grants Guide.

What are we looking for? A selection of indicators your organization currently tracks or proposes to track.

**Why are we asking?** Systems change work is characterized by progress and setbacks, and outcomes may take years to be realized and measured. We want to track specific activities and accomplishments along the way as you do this work to document progress toward your larger systems change goals.

- Constituent Power & Leadership
- Organizational Power
- Base-Building
- Advocacy & Organizing Wins
- Meaningful Impact Following Wins
- Organizational Capacity
- Public Will
- Political Will
- Organizational Visibility & Recognition
- Issue Awareness/Salience
- New or Strengthened Advocates & Champions
- New or Strengthened Partnerships & Alliances
- Other (please specify)

### YOUR PARTNERS | What (non-funding) organizations/coalitions do you consider your most critical partners in your work to advance systems change and why?

What are we looking for? Please list no more than five organizations/coalitions along with one or two sentences on why each partnership is critical to advancing your priorities.

Why are we asking? Because changing systems requires many organizations working together to build movements, and share knowledge and learning, we want to know which organizations you work closely with to achieve your goals.

We recommend responding in 250 words or less.

#### How Did Meyer Choose These Progress Indicators?

These categories were selected based on Alliance for Justice's [Build Your Advocacy Grantmaking](#), Harvard Family Research Project's [A User's Guide to Advocacy Evaluation Planning](#), and the Center for Evaluation Innovation's [Grassroots Action and Learning for Social Change: Evaluating Community Organizing](#). For definitions and examples of metrics for each of these categories, see our Progress Indicator Summary in [Appendix C](#).

## ANYTHING ELSE?

Is there anything else you'd like to tell us about your organization and its work that we didn't give you a chance to do elsewhere in this proposal?

If you choose to answer this question, we recommend responding in 100 to 250 words.

## REQUIRED ATTACHMENTS

### Organization Budget

Please attach your organization's budget for the current fiscal year. If your work is fiscally-sponsored, please attach a budget for the sponsored work. We are looking for a 1-2-page summary budget. Please make sure the budget includes both revenues and expenses.

### Most Recent Audit OR Year-end Financial Statements

If no audit is available, please provide your year-end unaudited financial statements or your most recently submitted IRS Form 990. If your work is fiscally-sponsored, please submit your organization's or project's (and not your fiscal sponsor's) most recent internal financial statements.

*What are we looking for?* We do not have a required format for your organizational or project budget, but we do want to see a budget that includes both revenue and expenses. We also want to see your year-end financial statements – the audit or, if your organization has not done an audit, your own year-end unaudited financial statements or your IRS Form 990. Year-end unaudited financial statements usually include a balance sheet/statement of financial position, income statement/ statement of activities, and a cash flow statement.

If you track your organization's finances on a cash (rather than accrual) basis, which is common for smaller organizations, your year-end statement will likely be just a statement of revenues and expenses.

*Why are we asking?* We want to understand if your budget and finances are realistic and adequate to carry out the proposed work. We generally do not decide whether or not to fund an organization based on the relative strength or weakness of its finances, but this information may help us in deciding the amount and timing of grants and may help to inform our capacity-building programs.

### Current Board List

Please either upload a current board list that includes the names and professional or community affiliations of each board member or add a website link in the field below that provides the same information.

*What are we looking for?* A list of the people who currently serve on your board (or governing body) and the professional and/or community affiliations of each of these individuals.

*Why are we asking?* We want to understand who is helping to guide the organization's work.

## FOR PROJECT REQUESTS ONLY

### **Project Budget**

Only if applying for project support. Please make sure the budget includes both revenues and expenses.

### **List of Project Funders**

If you are applying for a project grant, please include a list of funders along with the amounts committed or expected from each funder for your project.

Meyer is open to being the first funder for a project, so please don't be dissuaded from applying for a grant because you don't already have other funding committed.

*What are we looking for?* A list that includes the name of each funder that has committed or is expected to award funds, and the amount that each funder has committed or that you expect to receive from that funder.

*Why are we asking?* We want to understand if your funding – committed and likely – together with your budget is realistic and adequate to fund the proposed work.

## OPTIONAL ATTACHMENTS

### **Option to Submit a Proposal Written for Another Funder**

Instead of preparing new written responses to these narrative questions, you can submit a proposal you've developed for another funder that you feel adequately addresses Meyer's questions. Please upload the document, which should be no longer than 12 pages, to the link provided.

On the Proposal tab of the application form, please remember to reference the page number and paragraph from your document that answers each the question.

### **Optional Media Attachments**

This is optional. Please do not create anything new for this proposal. You may upload materials or include links to any pre-made videos or photo galleries, or any press or blog posts that showcase the work your organization is doing. Meyer will contact you for permission if we want to publicly share any of these materials. You may submit up to three files and/or three links.

### **Optional Organizational Documents**

This is optional. Please do not create anything new for this proposal. You may upload materials or include links to strategic organizational documents such as your current strategic plan, equity statement, vision statement, or other documents that provide insight into your organization. Because we ask you in the proposal to identify your partners there's no need to submit letters of support from other organizations. You may submit up to three organizational documents.

Thank you for completing this proposal and for sharing details of your work with us.

## Appendix C: Progress Indicator Summary

The Meyer Foundation does not specify metrics we require our partners to track. However, we do ask our partners to classify what they already track under “progress indicator” categories. Progress indicators are measures of progress or specific achievements related to systems change work that are important benchmarks along the path to achieve large, systemic goals and population-level change.

These shared indicators across our portfolios are intended to:

1. provide a common way to identify and talk about progress and outcomes;
2. help track progress of individual organization contributions, the collective impact of organizations in each portfolio and goal area, and broader movements in systems change efforts; and
3. help our partners discuss their progress and impact with others.

Below is a list of each progress indicator the Foundation is tracking, how we define the indicator, and *examples* of metrics that organizations may be tracking related to the indicator. The lists of example metrics are not exhaustive, and organizations may be tracking the progress indicators in other ways.

To develop this framework, we consulted the resources: *A Guide to Measuring Advocacy & Policy*, prepared for the Annie E. Casey Foundation by Organizational Research Services; *A User’s Guide to Advocacy Evaluation Planning*, developed by the Harvard Family Research Project; *Build Your Advocacy Grantmaking*, developed by Alliance for Justice Grassroots Action; and *Learning for Social Change: Evaluating Community Organizing*, developed by Center for Evaluation Innovation and Blueprint Research & Design for Philanthropy.

<i>Progress Indicator</i>	<b>Definition</b>	<b>Example Metrics</b>
<i>Constituent Power &amp; Leadership</i>	<ul style="list-style-type: none"> <li>• Development of the leadership skills, capacity to advocate, and decision-making power of the people most connected to the issue the organization addresses</li> </ul>	<ul style="list-style-type: none"> <li>• Changes in attitudes, skills, and knowledge</li> <li>• Changes in self-esteem and self-efficacy</li> <li>• Changes in stature within community or among decision makers</li> </ul>
<i>Organizational Power</i>	<ul style="list-style-type: none"> <li>• Ability to raise issue awareness, influence the narrative and proposed</li> </ul>	<ul style="list-style-type: none"> <li>• Development of relationships with decision makers,</li> </ul>

	solutions, and increase the will to act	<p>media, and influential figures</p> <ul style="list-style-type: none"> <li>• Changes in stature within community or among decision makers</li> <li>• Changes in membership</li> <li>• Changes in turnout to events</li> <li>• Policy wins</li> </ul>
<i>Base-Building</i>	<ul style="list-style-type: none"> <li>• Recruiting and retaining a large group of volunteer members from impacted communities who participate in and help direct and implement the work of the organization</li> </ul>	<ul style="list-style-type: none"> <li>• Change in the number of members</li> <li>• Increased engagement of members</li> </ul>
<i>Advocacy &amp; Organizing Wins</i>	<ul style="list-style-type: none"> <li>• A major achievement reached when a decision-maker takes a desired action as a result of an organization/movement's influence</li> </ul>	<ul style="list-style-type: none"> <li>• Policy wins</li> <li>• Shifts in norms or content of debate</li> <li>• Holding the line against negative actions</li> </ul>
<i>Meaningful Impact Following Wins</i>	<ul style="list-style-type: none"> <li>• Impact of an advocacy, organizing, or policy win on those most directly affected by the issue</li> </ul>	<ul style="list-style-type: none"> <li>• Positive outcomes for the constituents</li> <li>• Implementation of policies</li> <li>• Changes in practices</li> <li>• Public accountability for action or inaction</li> <li>• Sustained shifts in norms, narrative, or content of debate</li> <li>• Issue/policy-specific community impact metrics</li> </ul>
<i>Organizational Capacity</i>	<ul style="list-style-type: none"> <li>• The ability of an organization or coalition to lead, adapt, manage,</li> </ul>	<ul style="list-style-type: none"> <li>• Changes staffing</li> <li>• Changes in infrastructure</li> </ul>

*Public Will*

<p>and technically implement a system change strategy</p>	<ul style="list-style-type: none"> <li>• Changes in skills</li> <li>• Changes in resources</li> <li>• Infusing data and documentation into reflection</li> <li>• Use of data in refinement of strategy or tactics</li> </ul>
<ul style="list-style-type: none"> <li>• Willingness of a (non-policymaker) target audience to act in support of an issue, campaign, or policy proposal</li> </ul>	<ul style="list-style-type: none"> <li>• Changes in public involvement in an issue</li> <li>• Changes in the public narrative when describing the issue</li> <li>• Changes in the level of actions taken by champions of an issue</li> <li>• Changes in voter registration</li> <li>• Changes in voting behavior</li> <li>• Changes in the breadth of partners supporting an issue (e.g., number of “unlikely allies” supporting an issue)</li> <li>• Changes in media coverage (e.g., quantity, prioritization, extent of coverage, variety of media “beats,” message echoing)</li> <li>• Changes in awareness of campaign principles and messages among selected groups</li> </ul>

*Political Will*

	<ul style="list-style-type: none"> <li>• Changes visibility of the of the organization’s messages</li> </ul>
<ul style="list-style-type: none"> <li>• Willingness of policymakers to act in support of an issue or policy proposal</li> </ul>	<ul style="list-style-type: none"> <li>• Changes in support of the issue (e.g., number of “unlikely allies” supporting an issue)</li> <li>• Increased awareness of campaign principles and messages among selected groups</li> <li>• Echoing of organizational messaging from policymakers</li> <li>• Policymakers’ development of aligned policy proposals</li> <li>• Policymakers’ adoption of aligned proposals (e.g., ordinance, ballot measure, legislation, legally-binding agreements)</li> <li>• Policymakers’ implementation support (e.g., equity, adequate funding and other resources for implementing policy)</li> <li>• Policymaker’s monitoring and enforcing aligned legislation and policy (e.g., holding the line on bedrock legislation)</li> </ul>

*Organizational  
Visibility &  
Recognition*

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Identification of an organization or campaign as a credible source on an issue</li> </ul> | <ul style="list-style-type: none"> <li>• Changes in opportunities to serve as a subject matter expert (e.g. invitations to provide comment for an elected body, speak on panels, at conferences, in the community)</li> <li>• Changes in media coverage (e.g., quantity, prioritization, extent of coverage, variety of media “beats,” message echoing)</li> <li>• Changes in awareness of point of view and messages among selected groups (e.g., policy makers, general public, opinion leaders)</li> <li>• Changes in engagement with the organizations’ communications</li> </ul> |
|--|---|

*Issue  
Awareness/Salience*

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Audience recognition that a problem exists or familiarity with the proposed solution the organization is advancing</li> </ul> | <ul style="list-style-type: none"> <li>• Changes in the number of people in the target audience reporting the issue is important to them</li> <li>• Changes in the importance a target audience assigns an issue or proposed solution</li> <li>• Changes in how an issue is presented, discussed, or perceived</li> </ul> |
|--|---|

*New or Strengthened Advocates & Champions*

	<ul style="list-style-type: none"> <li>Changes in the narrative/framing of the issue</li> </ul>
<ul style="list-style-type: none"> <li>Previously unengaged individuals who act in support of an issue or position. High-profile individuals who adopt an issue and publicly advocate for it</li> </ul>	<ul style="list-style-type: none"> <li>Changes in the number of advocates recruited</li> <li>Changes in the number of type of constituencies represented among advocates, including bipartisan or unlikely advocates and champions</li> <li>Changes in the number and type of advocate actions to support issue</li> </ul>

*New or Strengthened Partnerships & Alliances*

<ul style="list-style-type: none"> <li>Mutually beneficial relationships among community and system partners, including nontraditional alliances, e.g., bipartisan alliances, unlikely allies, who support or participate in a system change strategy, coordinating their work and acting together</li> </ul>	<ul style="list-style-type: none"> <li>Changes in number of partners supporting an issue</li> <li>Increased level of collaboration (e.g., coordination)</li> <li>Changes in alignment of partnership efforts (e.g., shared priorities, shared</li> <li>Goals, common accountability system)</li> <li>Changes in strategic alliances with important partners (e.g., stronger or more powerful</li> <li>Relationships and alliances)</li> </ul>
---	---

	<ul style="list-style-type: none"><li>• Changes in the ability of coalitions working toward systems change to identify and understand the issue and barriers</li></ul>
--	--