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**Community Investments**

Corporate Giving | Torchbearers | Community Engagement

Dear Partner,

Thank you for your continued partnership. Your work enables us to meet the needs of thousands of our neighbors when they need us most.

As shared in our Spring newsletter, we engaged The Center for Effective Philanthropy (CEP) to facilitate an anonymous survey of our nonprofit Partners. We are extremely thankful to have received input from 285 Partners; and want to assure you that we are actively using the thoughtful and candid feedback to inform our grantmaking plans. While we are continuing to refine the details, based on your specific feedback and comparative analysis of similar foundations, we will be moving in a thoughtful and iterative process towards:

- **Larger Grants:** Increasing the amount awarded will allow our Partners to have greater impact and long-term sustainability.
- **Extend Grant Periods:** Coupled with larger grant sizes, we are extending our RFP grant periods to enable us to provide grants for 3 years. We hope this multi-year partnership will increase the capacity of our Partners and allow for better planning.
- **Increased Touchpoints:** We believe that relationships matter, so we are continuing to create additional opportunities for engagement with foundation staff and leadership.
- **Prioritizing Our Strategic Focus:** We understand this will create a more competitive funding environment as we lean into supporting funding strategies that lead to larger, longer-term grants. We acknowledge this will mean changes for some of our partners and we intend to make the transition as smooth and transparent as possible.

Our first briefing of the year will be a 2-Part session:

**Strategic Overview & Basic Services RFP Webinar – Thursday, April 25, 2024**

**2:00 PM: LMF Grantmaking Framework & Overview Information Session**

*Who Should Attend:* Suggested for all LMF Partners & Potential Partners, where we will highlight each initiative.

**2:40 PM: Basic Services RFP Webinar and Q&A**

*Who Should Attend:* Suggested for Partners & Potential Partners planning to apply to Basic Services RFP.

[Click Here to Register](#)

*Please note that Liberty Mutual Virtual Meetings use the Microsoft Team's Platform. We recommend you download and/or test Teams on your device prior to the meeting.*

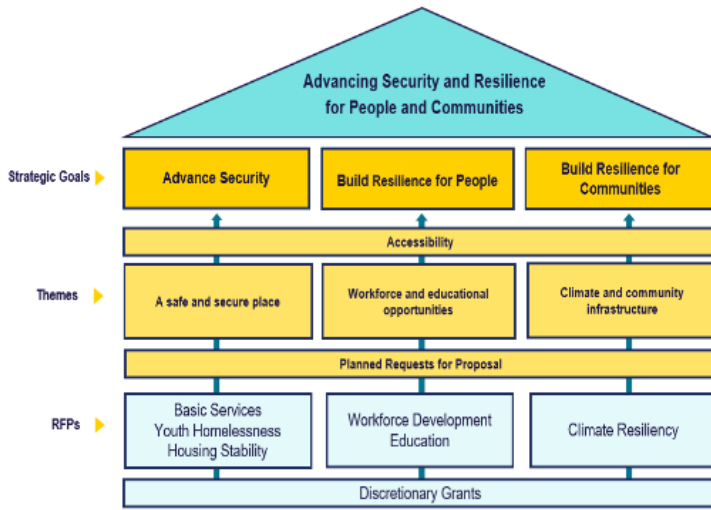
Thank you again for your continued partnership. We hope that you can join us for the session on April 25, 2024. In the meantime, if you have any questions, please feel free to email us at [Foundation@LibertyMutual.com](mailto:Foundation@LibertyMutual.com).

Sincerely,

Melissa MacDonnell, President  
Liberty Mutual Foundation

## 2024 Grantmaking Framework & Overview

### Liberty Mutual Foundation Framework



Liberty Mutual Foundation works to advance the security and resilience for people and communities. Simply stated, we are **Building Resiliency for People** and **Building Resiliency for Communities**. As a Mutual company it is at the heart of our business and the center of our community partnerships. Our Strategic Goals, Programmatic Themes, and ultimately our RFP Initiatives emerge from this framework.

Additionally, as we champion issues of Diversity, Equity and Inclusion in all that we do, accessibility, is at the forefront of our approach. We prioritize community initiatives dedicated to advancing access for people with disabilities. To that end, the Foundation gives preference to organizations and

programs with thoughtful and clearly articulated plans for the inclusion of people of all abilities.

### Summary of RFPs

**Basic Services:** The Basic Services Initiative works toward our mission of providing security by supporting nonprofit organizations that serve families and individuals who are experiencing homelessness and/or economic hardships and need emergency assistance. Historically, this initiative has supported efforts that provide access to food, health for the homeless, emergency shelter, clothing, and other immediate, basic needs.

**Climate Resiliency:** The newest and actively evolving initiative, the Climate Resiliency Initiative supports nature-based climate solutions in neighborhoods experiencing economic challenges, including access to affordable and locally grown food, increased green space, and decarbonization of neighborhoods. Additionally, it supports training/skill development for Green Jobs of the Future, particularly those efforts providing opportunity for underrepresented populations. Finally, it supports the development of resilient and sustainable infrastructure in diverse communities and those communities experiencing economic vulnerabilities.

**Discretionary Fund:** This fund's goal is to provide a means for potential partners to apply for support on a rolling basis. Requests should align with LMF's strategic goals and themes as outlined in our Framework.



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**Education Initiative:** The goals of the Liberty Mutual Foundation Education Initiative are to improve the educational achievement of underserved youth. Efforts should also expand educational opportunities using solutions vetted with input from those involved. The Initiative intends to locate and support educational programs that build on prior academic success and highlight a path to postsecondary education and/or career training.

**Housing Stability Initiative:** The goal of this initiative is to expand access to a full range of housing-related supports and programs that enable families and individuals experiencing economic challenges to find and remain in housing that is safe, affordable, and fits their needs and aspirations.

**Youth Workforce Development:** The goals of this initiative are to strengthen workforce development to prepare disconnected youth for post-secondary and career success and to provide opportunities in sustainable and emerging careers for young people 18-30 years of age who are unemployed or underemployed.

**Youth Experiencing Homelessness:** This initiative is a cohort of invited or recommended (including self-nominated) organizations that are working to end youth homelessness. As part of this partnership organizations are convened as a cohort towards the continued development of best practices and collaborations in the youth homelessness space. Further, the group includes national experts, and the ultimate purpose is to support this cohort of partners in building a sustainable and effective mechanism for the prevention and mitigation of youth homelessness. If you believe that your mission and work contribute to this space, we invite you to send a **brief paragraph** about your work to request a virtual meeting to discuss your efforts at [Foundation@LibertyMutual.com](mailto:Foundation@LibertyMutual.com).

### **Strategic Supplemental Investments**

*These Investments are only open to our current Partners. They are intended to assist partners in key areas that leverage their impact and contribute to long-term sustainability.*

**Impact Driven Collaborations:** To further advance our philanthropic goals and support the power of partnerships in our local communities, LMF is piloting an initiative that will make significant investments in **Impact Driven Collaborations (IDC)**. IDCs are strategic partnerships with 3 or more nonprofits that are working collaboratively to leverage expertise and maximize impact. They are defined by formalized partnerships, clear processes & goals, a focus on impact, including credible/reliable data collection systems, collaborative budgets and cultures that emphasize equitable partnerships. In 2024 LMF will grant **5-10 IDC Planning Grants** for \$300,000 each. These grants will support the development of the impact reporting infrastructure, goals, roles, and relationships necessary for sustainable collaborations.

**Climate Mini Grants:** Caring for our climate is an effort that involves us all. This initiative invites existing partners to take a bold step with us, in prioritizing Climate Resiliency. The work of many of our partners focuses on acute social issues and the idea of climate resiliency can often take a back seat to other pressing priorities. Therefore, this investment offers mini grants of up to \$15,000 to help Partners, their staff and our communities create greater climate consciousness, behaviors and plans that make us more climate resilient.

**Campaigns and Capital:** Each year LMF supports a limited number of Campaigns and Capital projects. These large grants typically range from \$500,000-\$1 million.



**RFP Timeline**

<b>Initiative RFPs</b>	<b>RFP Release*</b>	<b>Due Date*</b>	<b>Funding Decision*</b>
Basic Services	April 15	May 17	June 28
Climate Resiliency	August 21	September 20	October 25
Education	Released in 2025	--	--
Housing Stability	Released in 2025	--	--
Youth Workforce Development	Released in 2025	--	--
Discretionary Grants	Rolling	Rolling	Bi-Monthly