

2019 BASIC SERVICES INITIATIVE
REQUEST FOR PROPOSALS in Dallas, TX

Liberty Mutual Foundation



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INSURANCE

General Information

Background

Liberty Mutual's philanthropy invests in community initiatives dedicated to empowering individuals who are experiencing homelessness, advancing access for people with disabilities, and expanding educational opportunities for underserved students.

First released in Boston in 2007, the Basic Services Initiative works toward our mission of empowerment by supporting nonprofit organizations that serve families and individuals with housing instability, as well as those living in poverty and needing emergency assistance. In 2010 the initiative expanded into the Pacific Northwest, and in 2016 it was established in metropolitan Dallas. Over the last twelve years the Liberty Mutual Foundation has awarded nearly \$14.6 million in this giving area in these select communities, providing access to food, shelter, clothing, counseling and other immediate, basic needs. In Dallas, the average grant size has been almost \$30,000.

Applicants are encouraged to review Liberty Mutual Foundation's annual [Giving Report](#), to familiarize themselves with the type of programs supported through Foundation.

Initiative Timeline

Release Date: May 13, 2019

Response Deadline: June 17, 2019

Impact Report Due: June 30, 2020

Goals and Focus Areas

The goal of the Liberty Mutual Foundation Basic Services Initiative is to boost the capacity of existing basic services networks and safety net programs within metropolitan Dallas, with an emphasis on serving low-income neighborhoods. While we recognize that a continuum of services is the most effective response to poverty and homelessness, this RFP seeks proposals that address the immediate capacity of the region's homeless-serving and human services network to meet people's most basic needs. To that end, the Liberty Mutual Foundation aims to focus its support on programs that directly provide:

1. Shelter for youth, families or adults, including emergency shelter and time-limited transitional housing, with an emphasis on pairing shelter with access to case management or other social services.
2. Meals or food for low-income individuals and those experiencing homelessness, with an emphasis on health and nutrition.
3. Healthcare and medical services for those experiencing homelessness.

4. Other immediate, basic needs, e.g., clothing, toiletries or other aspects that pertain to hygiene, etc.

Grant Eligibility

The Liberty Mutual Foundation will award grants through this initiative to:

1. Established organizations that seek to provide basic services to youth, families or adults who are experiencing homelessness or are at risk of homelessness.
2. Organizations located in and serving residents of Dallas, Texas and its surrounding communities.
3. Not-for-profit organizations with a current 501c3 status.

Funding Availability and Grant Size

The amount of funding that will be dedicated to this initiative has not been predetermined. Instead, funding levels will be informed by the type, number, and quality of proposals submitted.

Applicants are encouraged to review Liberty Mutual Foundation's annual [Giving Report](#) to familiarize themselves with the type, number, and size of grants the Foundation has made in previous years.

Funding Cycle

The Liberty Mutual Foundation Basic Services Initiative is being released in Texas as a one-year initiative with funds to be awarded from July, 2019 through June, 2020.

Grant Awards

Grant awards will be distributed based upon the following criteria:

1. The ability of the organization to clearly define measures of success and to document and provide relevant data and evidence regarding the impact of the proposed grant. For organizations that have previously received Liberty Mutual funding, the submitted Impact Report and up to date financial information will be included as part of the new proposal review.
2. The level of innovation brought to local problems and the commitment to the community shown by the applicant organization and proposed program/project.
3. The estimated number of clients reached through the grant.
4. The anticipated organizational and community impact of the grant.
5. Alignment of the budget submitted and the proposal narrative
6. Other organizational factors such as
 - Organizations budget and sound financial data

- Organizational capacity, diversity, governance, history and reputation
- Other ancillary and complementary programs sponsored by the organization
- Other funding sources and diversified funding

Partnership Incentive Opportunity

Liberty Mutual Foundation is committed to promoting collaboration. As we thought about the ways the company could multiply increased pairings among the groups Liberty supports, several ideas surfaced. Like many of you we believe that when nonprofit organizations work together there is often more knowledge brought forth and value added for your constituents. The leverage and thoughtful solutions that can occur often improves outcomes and results in a better service or program. We have heard from you, our partners, that collaboration is a good goal, but that it doesn't occur without extra effort and expense.

To encourage more organizations to consider collaboration we would like to offer a partnership incentive. *If any Liberty grantee responds to this Request for Proposals (RFP) by developing a competitive proposal working with another nonprofit we will add a partnership bonus of up to \$20,000 to the final determined funding level.* The additional incentive should be split 50/50% for operating support between the two organizations.

To apply for the incentive, please incorporate your incentive request amount (up to \$20,000) within the same (Philanthropy MA) Budget Template used to submit your proposal request, along with an amplified budget narrative that includes the incentive amount requested and how you plan to allocate the extra funds. The Budget Template is located in the online (CyberGrants) proposal's Financial Information section.

Once notified that you are receiving a partnership bonus, we will ask that you execute and send us a signed Memorandum of Understanding (MOU) that has been developed with your collaborating organization.

That MOU should explain and set forth:

- The goals and objectives of the grant as defined by both organizations;
- Clear expectations for deliverables acknowledged by both nonprofits pertaining to the grant;
- The timeline for programs or services; and
- A twice yearly check-in process to make certain that all parties (including Foundation staff) are pleased with the progress of the grant.

Thank you for thinking about partnership and collaboration. We believe it is a path that will be both advantageous and necessary in the future. To read more about collaboration here is an excellent article by Katie Smith Milway and other good resources.

<https://www.bridgespan.org/insights/library/mergers-and-collaborations/nonprofitcollaborations>
<http://grantspace.org/tools/collaboration-hub>

Proposal Selection Criteria

Applicants for grants through the Basic Services Initiative will be evaluated on the following criteria (in no specific order):

1. **Relevance:** The grant applicant's mission and intent must closely follow the guidelines set forth in the RFP.
2. **Program Quality & Target Audience:** Applicants must thoroughly demonstrate the effectiveness of their program(s) in assisting low-income or homeless individuals and families in need of emergency services.
3. **Organizational Capacity:** Priority will be given to organizations that can demonstrate a thoroughly-established internal capacity for reaching individuals living in poverty and/or experiencing homelessness.
4. **Cost-effectiveness:** A budget for the program that demonstrates a cost-effective use of resources.
5. **Past Performance:** Liberty Mutual Foundation supports programs with a demonstrated track record of providing basic services to vulnerable populations so good performance on previous grants helps.

Funding decisions will be made at the sole discretion of Liberty Mutual Foundation and all decisions will be final. Involvement and input from young people in a youth-serving proposal is a pre-requisite.

Contact Information

Please use the opportunity of a new proposal to Liberty Mutual to check and update your organization's contact information in CyberGrants. Staff members no longer with your organization or inactive on the project should be removed.

Sustainability

Liberty Mutual Foundation gives preference to organizations and programs with diversified funding streams and multiple sources of program support.

Accessibility

Liberty Mutual invests in 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 at all levels of physical, cognitive and emotional abilities.

The Foundation may elect to award additional funding of up to \$20,000 for each organization that demonstrates a clear and effective commitment to promoting accessibility in their governance, staff, programs and activities. These supplemental funds will be directed specifically to support grantees' accessibility initiatives. Evidence

that organizations are embracing inclusive goals and programming will be requested in the general proposal questions.

Reporting Requirements

Grantees will be asked to submit a final report that specifically details the achievements, outcomes and opportunities made possible by the Liberty Mutual Foundation grant no later than June 30, 2020.

Funded organizations will receive an email from CyberGrants about when and how to access the online impact report approximately six weeks prior to the report's due date. The impact report may cover:

- **Accomplishments** achieved during the reporting period, including specific, measurable activities and outcomes as outlined in the initial grant proposal.
- **Challenges or setbacks** experienced during the administration of the program, and how they were addressed by your organization.
- **Unexpected results or key insights** learned over the course of the grant period.
- **Updated Financial Reporting** including year-to-date balance sheet, and profit and loss statements

If funded, organizations will receive a link from CyberGrants, soon after the funding announcement to complete a **Metrics Verification Report** to update their stated outcomes and goals based upon their final award amount. Major revisions to programs should be communicated quickly to Liberty Mutual Foundation staff for discussion and approval.

Proposal Deadline and Grant Announcements

Proposals for the Liberty Mutual Foundation Basic Services Initiative should be electronically submitted by 11:59 p.m. on **Monday, June 17, 2019**. **Late applications, incomplete applications, and applications not appropriately completed will not be considered.** Grant awards will be announced in July, 2019.

Conference Call

To answer questions related to the RFP requirements and process, a conference call will be held on Friday, **May 24, 2019** from 12:00 PM-1:00 PM (**Central Time**). Call-in information is provided below. Participation in the conference call is not required to apply, but the call will not be recorded.

Toll Free Dial-In Number: (855) 313-5500

Participant Code: 86502350

How to Apply

The Liberty Mutual Foundation Basic Services Initiative application can be found online by using this [link](#). Enter the invitation code “Texas” on the login screen, in addition to your login credentials:

Only proposals submitted through the online platform will be accepted.

Liberty Mutual Foundation
Giving Guidelines
FAQ
Foundation Report

Liberty Mutual Basic Services Initiative Application

First time user? [Create your password](#)

Please Log In * indicates required field

* E-mail Address:

* Password:

Invitation Code (optional):

[Forgot your password?](#)

Please note that you must have cookies and JavaScript enabled on your browser in order to successfully log in.

Questions

Questions about this request for proposals should be directed to Foundation@LibertyMutual.com.