2024-26 BASIC SERVICES INITIATIVE

REQUEST FOR PROPOSALS

Liberty Mutual Foundation

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INSURANCE

General Information

Background

Established in 2003, Liberty Mutual Foundation supports the communities in which we live and work. In conjunction with our nonprofit partners, our common purpose is to invest in the expertise, leadership and financial strength of Liberty Mutual Insurance and our employees to help our neighbors experiencing great vulnerability.

First released in Boston in 2007, the Basic Services Initiative Request for Proposals (RFP) works toward our mission of advancing security by supporting nonprofit organizations that serve low-income or homeless families and individuals in need of emergency assistance. In the last 17 years, Liberty Mutual Foundation has awarded over $24.6 million nationally through this effort, providing access to food, shelter, clothing, and other immediate, basic needs.

While our overall funding strategy has not changed, in response to feedback from our partners, this year we are implementing some new grant tactics. Going forward we will:

- Focus on longer, multi-year funding terms, which means Basic Services is now a 3-year initiative.
- Consider larger grant requests for partners that align closely with our outcome goals.
- Build deeper relationships through increased meaningful touchpoints between Liberty Mutual and our grantee partners.

This RFP is intended for nonprofit partners that offer programs and services to underserved families and individuals in economically challenged neighborhoods located in:

Greater Boston, defined as:

- Boston
- Brockton
- Cambridge
- Chelsea
- Quincy
- Randolph
- Somerville

Greater Puget Sound and select counties of Washington State, defined as:

- King County
- Whatcom County
- Pierce County
- Snohomish County
- Spokane County
- Thurston County

Applicants are encouraged to review *Our Giving*, to familiarize themselves with the type of organizations and programs supported through the Foundation as well as our *Purpose & Impact Report*, to learn more about the social impact work we're doing across the entire organization.

Initiative Timeline

Release Date:	April 15, 2024
Response Deadline:	May 17, 2024
Decision Date:	June 28, 2024
Interim Report #1 Due:	April 30, 2025
Interim Report #2 Due:	April 30, 2026
Final Report Due:	April 30, 2027

Dates are subject to change

Goals and Focus Area

The goal of the Liberty Mutual Foundation Basic Services Initiative is to boost the capacity of existing social service networks and safety nets within the communities where we fund. While we recognize that a continuum of services is the most effective response to homelessness, this RFP seeks proposals that address the immediate and most basic needs of individuals and families. To that end, 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, personal hygiene, etc.

Grant Eligibility

Liberty Mutual Foundation will award grants through this initiative to:

1. Organizations that seek to provide basic needs to youth, families or adults who are experiencing or are at risk of homelessness.
2. Organizations serving residents of the communities where we have an established funding presence.
3. Not-for-profit organizations with current 501(c)(3) status.

If you received funding as part of the 2022-23 Basic Services RFP, you are welcome to reapply. **If you have been funded in the past 12 months** by Liberty Mutual Foundation with a discretionary, Education, Housing Stability, Youth Workforce Development, or Youth Experiencing Homelessness grant and are uncertain about your organization's eligibility to apply, please contact us at Foundation@LibertyMutual.com.

Funding Availability and Grant Size

In the 2024-2026 cycle, the Foundation will consider larger, three-year investments given the increased needs of our community. The amount of funding dedicated to this initiative has not been predetermined. Instead, funding levels will be informed by the type, number, and quality of proposals submitted. We will also consider partial funding and general operating requests.

Funding Cycle

The Liberty Mutual Foundation Basic Services Initiative now operates on a three-year cycle. When filling out your application, please provide your request amount as a one-year amount.
E.g. If your total three-year request amount is $300,000, please enter $100,000.

Grantees selected through this RFP will receive a commitment for three years of funding pending the staff's successful review of interim reports and financial reviews. These reports will be simplified but are required to access the next funding installment.

New Basic Services Initiative proposals will not be accepted again until 2027, pending allocation.

Selection Criteria

Applicants for grants through the Basic Services Initiative will be evaluated on the following criteria:

1. **Relevance:** The grant applicant's mission and intent must closely follow the guidelines set forth in the RFP and should align with one or more of Liberty Mutual Foundation's goals to advance security:

   - # of individuals experiencing homelessness that gain access to basic supportive services
   - # of people moving out of temporary shelter and into more stable housing environments
   - # of people supported with temporary / emergency housing
   - # of evictions prevented

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, through the measurement and presentation of relevant data and evidence.

3. **Organizational Capacity:** Priority will be given to organizations that can demonstrate a fully established internal capacity for reaching individuals experiencing homelessness.

4. **Cost-effectiveness:** A budget for the program should demonstrate 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.

6. **Innovation & Impact:** Priority will be given to applicants that demonstrate a willingness to innovate and collaborate with other nonprofit and community organizations.

Funding decisions will be made at the sole discretion of Liberty Mutual Foundation and all decisions will be final.

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 of all abilities.

Reporting Requirements

Grantees will be required to submit two interim reports – one to access second year funding and one to access third year funding. A final report that specifically details the achievements, outcomes and opportunities made possible by the Liberty Mutual Foundation grant, will also be expected by April 30, 2027.

Funded organizations will receive instructions on when and how to access the online impact reports approximately six weeks prior to the reports' due dates. Reports may cover:

1. **General Operating Requests** If you received funding for operating support, a general overview of the organization's activities with an emphasis on services for the target populations of low-income children, youth, and families, and homeless individuals would be helpful. We also want to know approximately what percentage of your operating budget the Liberty grant comprises.

2. **Accomplishments** achieved during the reporting period, including specific, measurable activities and outcomes as outlined in the initial grant proposal.

3. **Challenges or setbacks** experienced during the administration of the program, and how they were addressed by your organization.

4. **Unexpected results or key insights** learned over the course of the grant period.

Funded organizations will also be asked to submit a Metrics Verification Report (MVR), soon after grants are announced, to update their stated outcomes and goals based on their final award amount or notify us of any organizational changes since the proposal was submitted.

When submitting the MVR in CyberGrants, you will also need to upload a signed and dated copy of your award letter to verify you have received payment.

2022-23 Basic Services Initiative grantees who wish to reapply during this cycle are asked to complete their final impact reports no later than the response deadline for this RFP.

Proposal Deadline and Grant Announcements
Proposals for the Liberty Mutual Foundation Basic Services Initiative should be electronically submitted by 11:59 p.m. on **Friday, May 17, 2024**. **Late applications, incomplete applications, and applications not appropriately completed will not be considered.**

Grant awards will be announced in late **June 2024.**

How to Apply
The Liberty Mutual Foundation Basic Services application can be found online using this link. **Only proposals submitted through the online platform will be accepted.**

Strategic Overview and Basic Services RFP Webinar
Thursday, April 25, 2024
2:00pm – 3:00pm EST / 11:00am – 12:00pm PST
Please register here.
This will be a Microsoft Teams event.

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

Proposal Questions, Format and Procedures

The online application can be accessed through the following link:

[2024-26 Basic Services Initiative](#)

Please follow the onscreen instructions to submit a request.

Note: Only one proposal per agency, submitted through this online platform, will be accepted. The information below is provided solely as a guide for preparation and does not constitute the application in its entirety.

Proposal Questions

1. **Project Title**
   Please share the name of your project/program in which you are a applying for. This does not need to be more than a few words.

2. **Requested Cash Amount**
   All figures in your proposal (Request amount, budget, number of participants to be served, anticipated outcomes, etc.) should reflect only <u>ONE</u> year of operations.

3. **Type of Support**
   Please indicate whether you're applying for operating, program, or capital support.

4. **Brief Description/Elevator Pitch**
   Foundation staff needs to quickly understand your program and be able to succinctly describe your request to others. If you are requesting funds for operating support, please clearly describe the organization's mission, goals, and impact for one year.

5. **Community Needs and/or Target Population**
   What issue do you plan to address? What research supports your ideas? If your program focuses on a specific population, describe the characteristics of this population, and discuss the specific needs, barriers and assets of this group. Provide a brief description of your organization's experience in serving this population and/or addressing identified needs.

6. **Project or Program Description**
   Please describe your program for which you seek funding. Include concrete and clear examples of how the proposed program will address the needs of the community and/or target population you identified above. How does your strategy differ from and/or compliment that of other service providers addressing the same need? Provide information about your program's core services, and when appropriate, the service timeline.

7. **Other Organization**
   Please tell us about another organization or program in your community that is successfully addressing the same or similar issues as you are. Tell us what makes their approach effective and how their efforts compliment your own.

8. **Monitoring and Evaluation**
   What is your process for monitoring and evaluating success in achieving your organization's (or your program's) goals? Please describe the tools and methods you use to track your program's effectiveness and discuss why these are appropriate in light of your stated goals.

9. **Previous Results**
   Please share your organization's (or your program's) results during your most recently completed reporting period, as measured by the evaluation tools and methods described in your application.

10. **Basic Services Metrics**
    Please provide the outcomes you expect to achieve specifically through the grant dollars requested in this application.

    We do not expect applicants to set goals for all pre-defined metrics. Rather, we ask that applicants focus only on those metrics which they measure and that are applicable to the goals (and evaluation tools) specific to the program(s) for which they are applying. If a particular metric does not apply to your program, leave that field blank. If needed, you also have the ability to define your own metrics. We recommend including no more than three self-defined metrics.

    If your request is funded, you will be asked to update your stated estimates with actual, achieved results when completing your impact report(s).

    Pre-defined Metrics:
    - # meals provided
    - Pounds of food distributed
    - # people receiving case-management services
    - # people obtaining employment
    - # people gaining access to programs and services promoting inclusion for people w/ disabilities
    - # people supported w/ temp. or emergency accommodations
    - # people moving out of temp. shelter and into more stable housing
    - # evictions prevented
    - # people experiencing homelessness gaining access to basic services (e.g. medical, food, hygiene, etc.)

    Custom Metric Inclusion: Did you include self-defined metrics as part of your anticipated program outcomes?

Custom Metrics Alignment: If you answered "yes" above, please select which (if any) of the Foundation's priority outcomes most closely describe your custom metrics.

- Promote access to safe shelter & housing
- Promote stabilizing, basic needs services
- Promote opportunities to further education or career training
- Promote access to employment
- Promote nature-based climate, or resilient infrastructure solutions
- Promote access to green jobs or careers
- n/a – custom metrics describe other program goals

11. <u>**Demographic Information Requested**</u>
- Total number served by the organization and by the program for which funds are requested
- Proposed number of program participants (based upon the one year requested grant amount)
- Age and academic level(s) served by the program
- Genders to be served by the program
- Children/Youth/Young Adults with disabilities served by the program
- Race or Ethnicity served by the program (%)
- Average family income of program participants (#) (identify sources used to determine income)
- Percentage of English-Speaking, Limited English-Proficient, and Non-English-Speaking students

12. <u>**Financial Information and Requested Documents**</u>
- Average Cost Per Participant (based on overall program costs, not just grant request)
- Listing of other funding sources and grant amounts
- Organization and program budget using the [Philanthropy MA Budget Template](#)
- A current financial Statement of Activities and Balance Sheet for your organization
- Latest Audited Financial Statement or Financial Review
- Latest IRS Form 990; applicants should refer to the [IRS website](#) to verify filing requirements.

APPENDIX

Frequently Asked Questions

1. **Our organization received funding through the 2022-23 cycle of the Basic Services Initiative. Do we need to submit a final report before we can apply through the RFP?**
   2022-23 Basic Services Initiative grantees who wish to reapply during this cycle are asked to complete their final impact reports no later than the response deadline for this RFP.

2. **Our organization received a grant through the Foundation's discretionary grants program within the last 12 months. Can we also apply for a grant through the Basic Services Initiative?**
   No, if your grant is still considered active and was issued after May/June 2023, you are ineligible for this RFP.

3. **What is the maximum/minimum amount that our organization can request through this RFP?**
   A grant range has not been predetermined. Funding levels will be competitive, determined by the type, number and quality of proposals submitted.

4. **Should our request amount and proposal information cover three full years of programming?**
   No. While we are committed to providing level, second-year and third-year grants to successful applicants, these funds are contingent upon the successful completion and review of an organization's interim impact reports.

5. **We would like to discuss our proposal ideas with someone at the Foundation before submitting. Is there a number we can call? Can we request a site visit?**
   Unfortunately, we are unable to speak with every organization interested in applying. We recommend that you participate in the listed conference call. Preliminary site visits and interviews will be conducted on an as-needed basis. You should submit your questions via email to Foundation@LibertyMutual.com. Please keep in mind that the RFP is a competitive process and that we are unable to "pre-vet" applications.