

Liberty Mutual Foundation

2022 CLIMATE RESILIENCY INITIATIVE

BOSTON REQUEST FOR PROPOSALS

General Information

Overview

Established in 2003, Liberty Mutual Foundation supports the communities in which Liberty Mutual employees 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 advance security and build resiliency for people and communities in vulnerable situations. To further this purpose, we are launching Climate Resiliency as a new priority area of funding. Building on its efforts to strengthen communities, Liberty Mutual Foundation believes philanthropy can play an important role in increasing climate resiliency in vulnerable communities. These efforts can bridge the divide between mitigation and adaptation approaches to climate change. Philanthropy can support innovative solutions, scale proven strategies, support nature-based climate solutions, strengthen grassroots efforts, and more.

This Request for Proposals (RFP) seeks proposals that address Climate Resiliency. In this phase, Liberty Mutual Foundation seeks to support efforts to increase climate resiliency in low-income and/or underrepresented neighborhoods in the City of Boston. Within this new focus area, Liberty Mutual Foundation will support three strategic areas of investment:

1. Nature-based solutions to create more climate resilient communities

Liberty Mutual Foundation seeks to support nature-based climate solutions in low-income neighborhoods and communities of color that will:

- Increase access to affordable, locally grown, healthy food, and/or
- Increase green space, urban farms, and trees, creating more carbon-rich urban neighborhoods – places that absorb more carbon than they release.

2. Training/skills development to prepare low-income, vulnerable, and underrepresented youth and adults for current and future green jobs

Liberty Mutual Foundation seeks to raise awareness, build career pathways, and increase access to clean energy jobs and other green jobs for unemployed and underemployed individuals who are traditionally underrepresented in these industries.

Priority populations:

- Vulnerable youth and young adults, including youth experiencing homelessness, low-income youth, and youth with disabilities
- People of color, women, people impacted by the criminal justice system, and other low-income adults who are traditionally underrepresented in clean energy/green jobs

3. Development of resilient and sustainable infrastructure in low-income neighborhoods and communities of color

Liberty Mutual Foundation seeks to support efforts to:

- Scale up solutions aimed at retrofitting low-income housing to make it greener, more energy-efficient, and more resilient; and/or
- Build community-powered solutions that reduce energy costs and increase access to affordable renewable energy in low-income communities

Priority populations include low-income neighborhoods and communities of color.

Organizations responding to this RFP may submit one application, which may be for a discrete program or as part of a collaboration. The Foundation will consider proposals from nonprofit organizations in the City of Boston (city limits) or those with a compelling case for expanding or launching programs in Boston, and will consider two types of applications:

1. **Planning** – a 12-month grant in the range of \$25,000 to \$75,000 to support planning activities to build partnerships and capacity to launch, expand, or leverage a longer-term initiative – e.g., to develop the capacity to apply for an implementation grant from government, private or philanthropic sources, including but not limited to the Liberty Mutual Foundation.
2. **Implementation** – a 12-month grant of up to \$100,000 for a discrete program or up to \$200,000 for a collaborative project designed to achieve measurable outcomes. For collaborations, the applicant should be the lead partner.

Initiative Timeline

Release Date: Friday, July 15, 2022

Q&A Session: Thursday, August 11, 2022

Proposal Deadline: Thursday, September 8, 2022

Final Report Due: Friday, November 3, 2023

Grant Eligibility

Liberty Mutual will award grants through this initiative to organizations that:

1. Seek support for discrete programs within their organization or for collaborative initiatives to support the goals described in this RFP. Collaborative initiatives should have clear measures of success and may include efforts to build capacity, improve quality and impact, or scale up efforts within low-income communities – or to increase climate resiliency in other significant ways;
2. Have experience in addressing climate resiliency issues, with a focus on serving our most vulnerable communities;

3. Currently operate in the City of Boston or have demonstrated support/relationships in Boston and a compelling case for expanding into the city; and
4. Are designated by the IRS as a 501(c)(3) nonprofit organization.

Current partners are eligible to apply for a grant through this RFP process if their active grant period ends by December 31, 2022. If you wish to apply for this grant and your final impact report is due after September 8, 2022, we recommend submitting by September 8, 2022. Please note that grant periods end 12 months from the date grants are awarded.

Funding Availability and Grant Size

Funding levels will be informed by the type, number and quality of proposals submitted. Organizations submitting proposals may choose to apply for a **planning grant of \$25,000 to \$75,000**; an **implementation grant of up to \$100,000 for a discrete program**; or an **implementation grant of up to \$200,000 for a collaborative initiative**.

Funding Cycle

For this new focus area, the intent is to provide a one-year grant to support proposals selected through this RFP process. Some grantees may later be invited to apply for a subsequent grant.

Grant Awards

Grant awards will be distributed based upon the following criteria:

1. The ability of the organization to define clear measures of success, and to document and provide relevant data and evidence regarding the impact of the grant.
2. The level of innovation and commitment of the applicant organization and proposed program/project.
3. The estimated scope of the program.
4. The organizational and community impact of the grant.
5. Other organizational factors such as:
 - Clear budget and financial data
 - Organizational capacity, diversity, governance, history and reputation
 - Other ancillary and complementary programs sponsored by the organization
 - Experience collaborating with other organizations
 - Connection to the community
 - Other program funding sources and a diversified funding base

Selection Criteria

Applicants for grants 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 communities, through the measurement and presentation of relevant data and evidence.
3. **Organizational Capacity:** Priority will be given to organizations that can demonstrate internal capacity and experience in reaching low-income communities.
4. **Cost-effectiveness:** A budget for the program should demonstrate cost-effective use of resources.

5. **Past Performance:** Liberty Mutual Foundation supports programs with a demonstrated track record of serving vulnerable populations and communities.
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. Liberty Mutual Foundation gives preference to organizations and programs with varied funding streams.

Reporting Requirements

1. A brief Metrics Verification Report will be required soon after funding announcements. Awarded organizations will use this report to refine key metrics that will be measured throughout the grant period to demonstrate impact.
2. A Final Report that specifically details the achievements, outcomes and opportunities made possible by this grant, expected by Friday, November 3, 2023.

Funded organizations will receive instruction on when and how to access online impact reports approximately six weeks prior to the report's due date. Reports will cover:

- **Accomplishments** achieved during the reporting period, including specific, measurable activities and outcomes as outlined in the initial grant proposal, the number and type of participants and/or communities served by the program, and other relevant data.
- **Challenges or setbacks** experienced during the grant period, and how they were addressed by the organization.
- **Unexpected results or key insights** that were learned during the course of the reporting period.

Organizations responding to this RFP are asked to propose metrics that they are prepared to measure and report on, and to identify those metrics that most strongly support the proposal's goals. Examples of metrics for Climate Resiliency and relevant strategies are provided below.

Examples of Metrics for Climate Resiliency Grants

The list below provides some sample metrics. Grant applicants may have metrics that are different from these examples and more closely aligned with proposed goals.

Nature-Based Solutions

- Increase in green space acreage (farms, gardens, parks) and number of trees planted in low-income urban communities
- Pounds of local food produced by urban farms and community gardens
- Pounds of local food donated or sold at a deep discount to low-income individuals and families, and overall increase in access to fresh, healthy food in low-income communities
- Number of youth and other community members engaged as volunteers in urban farming and local food production and distribution
- Reduction in urban heat island effects in Boston neighborhoods
- Reduction in carbon footprint of producing local food (as compared to conventional supply chains)

Training/Skills Development for Green Jobs of the Future

Increase in number of vulnerable and low-income youth and adults trained for clean energy jobs, green construction jobs, and other green jobs who are traditionally underrepresented in these industries

- Increase in number and percentage of people of color
- Increase in number of people that earn an industry recognized credential or complete coursework in green construction techniques (e.g., LEED Green Associate)
- Increase in number of vulnerable and low-income youth and adults placed in clean energy/green work-based learning (internships, apprenticeships, co-op)
- Increase in number of vulnerable and low-income youth and adults hired for clean energy/green jobs, with job retention of at least six months
- For all of the above:
 - Increase in number and percentage of people of color
 - Increase in number and percentage of people experiencing homeless, youth aging out of foster care, and youth and adults impacted by the criminal justice system
- Enhanced physical environments, programming, quality of services, capacity, infrastructure, or other conditions that will increase climate resiliency in low-income neighborhoods and among vulnerable populations

Developing Resilient and Sustainable Infrastructure

- Increase in funding invested in retrofits for energy efficiency
- Increase in number of units improved through energy efficiency upgrades
- Increase in funds saved for homeowners, landlords, and tenants in low-income communities through improved energy efficiency
- Carbon saved by energy efficient upgrades

Proposal Questions, Format and Procedures

The online application can be accessed through this [link](#).

Please follow the onscreen instructions to submit a request.

Note: Organizations may submit only one proposal, submitted through this online platform. The Foundation will host a virtual Question and Answer session on **Thursday, August 11, 2022, from 1:00pm – 2:00pm EST**. The information below is provided only as a guide for preparation and does not constitute the application in its entirety.

Please note that the priority for the climate resiliency focus area is to serve low-income communities and communities of color.

Proposal Questions

Please note: If any questions are difficult to answer due to the nature of your proposal, please respond as best you can or indicate N/A (not applicable).

1. Description of Project or Program

a. Please describe your proposed project or program and how it will address one or more of the following goals:

i. Nature-based solutions – Support nature-based climate solutions in low-income communities that will:

- Increase access to affordable, locally grown, healthy food
- Increase green space, urban farms, and trees, creating more carbon-rich urban neighborhoods

ii. Training and Skills Development for Green Jobs of the Future

- Raise awareness, build career pathways, and increase access to clean energy/green jobs for unemployed and underemployed adults who are traditionally underrepresented in these industries

iii. Resilient and Sustainable Infrastructure

- Scale up solutions aimed at retrofitting low-income housing to make it greener, more energy-efficient, and more resilient
- Build community-powered solutions that reduce energy costs and increase access to affordable renewable energy in low-income communities

2. Request Cash Amount

All figures in your proposal (budget, numbers to be served, anticipated outcomes, etc.) should reflect ONE year of operations.

3. Project Title/Elevator Pitch

Foundation staff members need to quickly understand your program and be able to succinctly describe your request to others.

4. Monitoring and Evaluation

a. Please describe your process for monitoring and evaluating your program's success. Include metrics showing your results over the past 12-18 months and describe how these results are leading toward the achievement of your stated goals.

5. Activities and Outcomes

a. Describe the goals and specific program activities that your organization proposes to address. Please use the following format to describe activities and outcomes:

Goals: *(What goals does the proposal seek to advance?)*

Activity: *(How will the requested grant be used to achieve program goals?)*

Expected Outcome: *(What are the benefits or changes over time that you expect as a result of your activity?)*

Baseline: *(How will you determine your expected outcomes?)*

Measurement: *(How will you collect and measure your outcomes?)*

6. Demographic Information Requested
 - a. Total number served by the organization and by the program for which funds are requested
 - b. Proposed number of program participants (based on requested grant amount)
 - c. Genders served by the program (%)
 - d. Race or Ethnicity served by the program (%)
 - e. Average family income of program participants (#) (identify sources used to determine income)
 - f. Percentage of English-Speaking, Limited English-Proficient, and Non-English-Speaking participants

7. Financial Information and Requested Documents
 - a. Average cost per participant (based on overall program costs, not just grant request)
 - b. Listing of other funding sources and grant amounts
 - c. Organization and program budget using the [Philanthropy MA Budget Template](#)
 - d. A current financial Statement of Activities and Balance Sheet for your organization
 - e. Latest Audited Financial Statement or Financial Review
 - f. Latest IRS Form 990; applicants should refer to the [IRS website](#) to verify filing requirements

8. Are you applying for a planning grant? [YES/NO]

IF NO, continue to Question 9.

IF YES, please describe:

- a. Goals of the requested planning grant
- b. Rationale, including how the requested grant will help to leverage other funding or achieve long-term impact
- c. What organizations or other partners will participate in the planning grant activities, including MOUs and/or letters of support
- d. Timeframe for planning grant activities
- e. Anticipated funding sources to support subsequent anticipated implementation activities
- f. Concrete outcomes to be achieved through the planning process

9. Are you applying for an Implementation Grant? [YES/NO]

IF YES, respond to the questions below:

- a. What is the rationale for your proposed effort? What research and/or data supports your ideas?
- b. What community/ies does your proposal focus on? What are the characteristics of the target population(s) or community/ies, including specific needs, assets and barriers?

- c. Briefly describe relevant experience of your organization and any collaborating partners in serving the target populations/communities and addressing their needs.
- d. Describe how you will conduct outreach and engage the community in the proposed efforts, including any methodologies to be used to gather input or inform program planning.
- e. Describe the criteria and processes used to identify communities who may best benefit from the proposed efforts. Please be certain to include a description of positive characteristics that you seek in prospective participants or neighborhoods, and challenges that may arise in identifying and/or reaching your target goals.
- f. Please share how this proposal connects to or leverages other programs or services your organization provides.

10. Are you applying for an Implementation Grant for a collaborative effort? [YES/NO]

IF YES, please describe:

- a. The organizations involved in the collaborative and the role of each organization, including MOUs and/or letters of support
- b. How the proposed approach will build capacity, increase scale, improve quality and impact, advance work in this field, or achieve significant and sustainable impact in other ways.

11. Are you applying for an Implementation Grant focusing on green jobs? [YES/NO]

IF YES, please describe:

- a. Occupations and careers that are the focus of your proposal.
- b. Employer partners, if any, and how they will participate in the program.
- c. Program design and services that will be provided to participants.
- d. Certifications (if any) required for employment in the targeted occupations, and what supports will assist program participants in completing any needed certifications.
- e. Relevant experience of staff who will be providing services.