

2024-26 CLIMATE RESILIENCY INITIATIVE
GREATER BOSTON REQUEST FOR PROPOSALS

Liberty Mutual Foundation



Liberty Mutual.
INSURANCE

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.

To further this purpose, in 2022 we advanced Climate Resiliency as a priority area of funding. Liberty Mutual Foundation believes philanthropy can play an important role in increasing climate resiliency. These efforts can bridge the divide between mitigative and adaptive approaches to climate change. Philanthropy can support innovative solutions, scale proven strategies, support nature-based climate solutions, strengthen grassroots efforts, and more. Since 2022, Liberty Mutual Foundation has awarded 43 Climate Resiliency grants across Greater Boston, totaling nearly \$3.9 million.

This year, in response to feedback from our partners, we are implementing some new grant tactics. Going forward we will:

- Focus on longer, multi-year funding terms, which means **the Climate Resiliency RFP is now a three-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.

Geographic Focus

This RFP is intended for nonprofit partners that offer programs and services located in Greater Boston, defined as:

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

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 are doing across the entire organization.

Initiative Timeline*

Release Date: August 21, 2024
Q&A Webinar: August 29, 2024, 2-3pm EDT
Proposal Deadline: September 23, 2024

Metrics Verification Report Due: Within 30 days of grant approval
Interim Report #1 Due: September 30, 2025
Interim Report #2 Due: September 30, 2026
Final Report Due: September 30, 2027

**Report due dates subject to change.*

Initiative Overview

Within Climate Resiliency, Liberty Mutual Foundation will continue to 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.

2. Training/skills development to prepare 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 include:

- 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.

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.

Grant Eligibility

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

- Seek support for programs that align with the goals described in this RFP. Programs should have clear measures of success, and may include efforts to build capacity, improve quality and impact, or scale up efforts to increase climate resiliency.
- Have relevant experience in addressing climate resiliency issues.
- Operate in the locations described above or have demonstrated support in those neighborhoods and a compelling case for expanding into them.
- Are designated by the IRS as a 501(c)(3) nonprofit organization.

If you received funding as part of the 2023 Climate Resiliency Initiative RFP, you are welcome to reapply. If you have been funded in the past 12 months by Liberty Mutual Foundation through other means and are not sure about your organization's eligibility, please contact us at Foundation@LibertyMutual.com.

Funding Availability and Grant Size

Funding levels will be competitive, determined by the type, number and quality of proposals submitted. We expect that the minimum per-year grant amount will be \$50,000 (\$150,000 over three years).

Funding Cycle

The Climate Resiliency Initiative now operates on a three-year cycle. When completing your application, please provide your request amount, as well as numbers served, program outcomes, etc., on a one-year basis.

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 Climate Resiliency Initiative proposals will not be accepted until 2027, pending allocation.

Grant Awards

Grant awards will be distributed based upon the following criteria:

1. The organization's ability to define clear measures of success and to document and provide relevant data and evidence regarding the grant's impact.
2. The level of innovation and commitment of the applicant organization and proposed program.
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, and history.
 - 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.

Accessibility

Liberty Mutual Foundation 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 details the achievements, outcomes and opportunities made possible by this award will be due no later than September 30, 2027.

Funded organizations will receive instruction on when and how to access online impact reports approximately six weeks prior to the reports' due dates. Reports 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 grant period, and how they were addressed by the organization.
- **Unexpected results or key insights** learned during the reporting period.

Funded organizations will be asked to submit a **Metrics Verification Report (MVR)** soon after grants are announced, to update stated outcomes and goals or describe any material changes since the proposal was submitted, and to upload signed copies of award letters.

2023 Climate Resiliency Initiative grantees who wish to reapply during this cycle are encouraged to complete their final impact reports no later than the response deadline for this RFP.

Metrics

Organizations responding to this RFP are asked to provide metrics that they are prepared to measure and report on, identifying those metrics that most strongly support the proposal's goals. Example metrics are provided below, including some (*italicized*) which are pre-defined and included in the online proposal.

Organizations may track outcomes that are different from these examples, or more closely align with their proposed goals. We encourage applicants to provide no more than three self-defined metrics, and to make use of the online proposal's pre-defined options when possible, including:

- *Amount of green space protected, maintained, or created.*
- *Pounds of food produced by local, urban farms and community gardens.*
- *Number of people that receive skills training for green jobs.*
- *Number of people obtaining green workforce-related jobs.*
- *Number of housing units improved through energy-efficiency upgrades.*
- *Amount saved (in dollars) for homeowners, landlords, or tenants in low-income communities through improved energy efficiency.*
- *Number of people within communities that are impacted by nature-based solutions or improved infrastructure.*

Other metric examples include:

Nature-Based Solutions

- Number of youth and other community members engaged as volunteers.
- Reduction in carbon footprint through shortening the food supply chain.

Training/Skills Development for Green Jobs of the Future

- Percent of students successfully completing training program.
- Number of youth retaining employment for six or more months.

Developing Resilient and Sustainable Infrastructure

- Increase in funding invested in retrofits for energy efficiency.
- Carbon saved by energy efficient upgrades.

How to Apply

The Liberty Mutual Foundation Climate Resiliency proposal is located [online](#). **Only proposals submitted through the online platform will be accepted.**

Climate Resiliency Initiative Webinar Q&A

Thursday, August 29, 2024

2:00pm – 3:00pm EDT

Please register [here](#).

After registering, you will receive a confirmation email containing information about joining the webinar. Attendance is recommended, especially for new applicants, but is not required to apply. The webinar will be recorded.

Questions

Questions about this RFP should be directed to Foundation@LibertyMutual.com.

Proposal Questions, Format and Procedures

The online application can be accessed through the following [link](#). Please follow the online instructions to submit a request.

Note:

If you have an active Liberty Mutual Grant through the following Initiative RFPs or strategic supplemental investments, you **are eligible** to apply through the 2024-26 Climate Resiliency Initiative:

- 2023 Climate Resiliency Initiative
- 2024 Impact Driven Collaborations – Planning Phase I

If you have an active Liberty Mutual Foundation grant through the following Initiative RFPs, you **are not eligible** to apply through the 2024-26 Climate Resiliency Initiative:

- 2024-26 Basic Services Initiative
- 2023-24 Education Initiative
- 2023-24 Youth Workforce Development Initiative
- 2023-24 Housing Stability Initiative

The information below is intended as a guide and does not comprise the entire application. 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).

Proposal Questions

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 youth or 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 (request amount, project budget, numbers to be served, anticipated outcomes, etc.) should reflect ONE year of operations.

3. Project Title and 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. Include metrics showing your most recent results and describe how these results lead 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 requested funds be used to achieve program goals?)
Expected Outcome:	(What are the benefits or changes over time that you expect will result from 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 its program
- b. Proposed number of program participants
- c. Genders served by the program (%)
- d. Race or Ethnicity served by the program (%)
- e. Average family income of program participants
- 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)
- b. List of other funders (including amounts)
- c. Organization and program budget, using the [Philanthropy MA Budget Template](#)
- d. Organization's current Statement of Activities and Balance Sheet
- 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 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. Time period 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, please describe:

- a. The rationale for your proposed effort. What research and/or data supports your ideas?
- b. The community/ies your proposal focuses on. What are the characteristics of the target population(s) served, including specific needs, assets, and barriers?
- c. The relevant experience of your organization and any collaborating partners in serving the target populations/communities and addressing their needs.
- d. 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. 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 or reaching your target goals.
- f. 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 collaboration 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.

APPENDIX

Frequently Asked Questions

- 1. Our organization received funding through the 2023 RFP. Do we need to submit a final report before we can apply through the new RFP?**

You do not need to submit your final report prior to starting a new proposal.

However, prior RFP partners are encouraged to complete their reports by the current RFP deadline, September 23. Unless previously arranged with Foundation staff, final reports are due September 30 and must be completed prior to the awarding of any new grants.

- 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 this initiative?**

In general, partners with an active grant (i.e., received payment within the last 12 months or have not completed their final report) are not able to apply for new opportunities. If you are not sure about your organization's eligibility, please email your questions to Foundation@LibertyMutual.com.

- 3. Can Massachusetts organizations outside of the City of Boston apply?**

In addition to the City of Boston, we are also accepting applications from organizations located in or serving residents of Brockton, Cambridge, Chelsea, Quincy, Randolph, and Somerville.

- 4. 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. While many factors will be considered, we anticipate that the minimum per-year grant amount will be \$50,000 (\$150,000 over three years).

- 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 webinar. 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.

Examples of Questions Asked in Impact Reports

1. Start Report Period / End Report Period

Please enter the start and end dates for the grant reporting period included in this impact report.

2. Future Operation

Given the current success (or challenges) experienced during the reporting period, how likely is it that the program funded by this Climate Resiliency Initiative grant will continue to operate over the next 12 months?

3. Major Accomplishments

Referring to the goals and objectives outlined in your original request, please briefly describe your major accomplishments during the reporting period.

4. Organization Changes

Please describe any material changes to your organization or program during the reporting period, or that you expect to occur in the next 12 months, e.g., key staff changes, significant increase or decrease in budget, substantial growth in program size or geographic footprints, etc.

5. Metrics – Outcomes

Referring to your program's anticipated outcomes, please update the following metric fields with **actual outcomes** achieved during the reporting period.

6. Setbacks or Challenges

Please describe any setbacks or challenges you encountered over the course of the grant, including how they may have impacted your organization or project.

7. Key Insights

Please share any unexpected results or key insights you've learned about your program or organization over the course of this grant.