

2025-2027 EDUCATION INITIATIVE REQUEST FOR PROPOSALS

Liberty Mutual Foundation



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INSURANCE

General Information

Background

Liberty Mutual Foundation launched its first Education Initiative in Boston in 2007. Since then, through this initiative, the Foundation has awarded over \$53 million nationally to 302 nonprofit organizations that offer proven and positive results that create and expand academic opportunities for young people to graduate high school and achieve post-secondary success.

This Request for Proposals (RFP) is intended for nonprofit partners that offer programs and services to underserved young people 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
- Kitsap County
- Pierce County
- Snohomish County
- Spokane County
- Thurston County

In our continued efforts to produce larger and longer-term grants for our partners and increase intentional opportunities for connection with our partners, this will now be a three-year initiative.

Initiative Timeline

Release Date:	March 17, 2025
Proposal Deadline:	April 18, 2025
Metrics Verification Report Due:	Within 30 days of grant approval
Interim Report (year 1) Due:	May 1, 2026
Interim Report (year 2) Due:	May 1, 2027
Final Report Due:	May 1, 2028

Goals of the Education Initiative

The goal of the Liberty Mutual Foundation Education Initiative is to improve the educational achievement of underserved youth. Programs and services must expand educational opportunities for youth using vetted solutions developed with input from experienced staff, instructors, and educators. Furthermore, the Education Initiative will support educational programs for young people grades 9 and up that focus on academic success, college access, and/or certified career training. The Liberty Mutual Foundation aims to achieve these goals by funding catalytic nonprofits to:

1. Create programs and initiatives to accelerate learning for underrepresented students who are at the greatest risk of experiencing learning loss. These efforts may include programs offering individualized tutoring, internship opportunities, and/or efforts to deepen and broaden access to learning.
2. Expand academic opportunities for underserved students. This funding will promote learning in out-of-school-time and during extended learning programs that focus on academic success, post-secondary success, and college access. Ideal programs will support students graduating high school, emphasize and highlight the path to college, offer early college learning opportunities, and/or offer post-secondary preparation.
3. Support programs that create pathways for older youth and young adults to re-engage with the educational system. This includes youth who have abandoned school prior to completion and youth who have attained a high school diploma/GED but have not progressed to higher education or training.

Grant Eligibility

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

1. Organizations that seek to promote equitable educational opportunities through in-school, after-school, or summer programming. Grants will also be awarded to those that deliver educational and academic opportunities during non-traditional hours, or by offering individualized programs or activities outside of school settings.
2. Organizations whose intent is to assist economically challenged students in grades 9+ and to help high school graduates attain post-secondary success—which may include vocational or technical training. Preference will be given to organizations that also ensure that students successfully complete post-secondary education or training.
3. Organizations that focus on literacy proficiency, including English language-learning programs, to bolster academic performance, and social opportunities for youth and adolescents.
4. Organizations serving students who reside in the communities as defined above.
5. Not-for-profit organizations with current 501(c)(3) status.
6. Organizations that are current recipients of a grant through the 2023 Education Initiative, organizations who have previously received discretionary funding before June 2024, and organizations that are not currently in an active grant are eligible to apply.

If you have questions regarding your eligibility, please contact Foundation@LibertyMutual.com.

Funding Availability and Grant Size

The amount of funding Liberty Mutual Foundation will budget for this initiative, or to specific program models within the initiative, has not yet been decided. Funding levels will be competitive, determined by the type, number and quality of proposals submitted.

Funding Cycle

The Liberty Mutual Foundation Education Initiative operates on a three-year cycle. Organizations selected through this RFP will receive a commitment for three years of funding, pending availability of funds and our successful review of your interim reports. **Interim reports, due May 1, 2026, and May 1, 2027, will be required to access second-year and third-year funding.** We would also ask to be informed of any material changes related to program budget, personnel, or programs.

New Education Initiative grant proposals will not be accepted in 2026-2027. The next Education Initiative RFP will be dependent upon board approval and would not occur before 2028.

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 educational 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 and the number of youth reached through the grant.
4. The anticipated organizational and community impact of the grant.
5. Other organizational factors will also be considered such as:
 - Clear budget and financial data
 - Experienced personnel
 - Organizational capacity, diversity, governance, history, and reputation
 - Other ancillary and complementary programs sponsored by the organization
 - Other program funding sources or a diversified funding base

Selection Criteria

Applicants for grants through the Liberty Mutual Foundation Education 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 this RFP, and the work must align with our top-level metric for the Education Initiative:
 - # of people supported to enter college and/or vocational programs

While this metric is our primary focus, we acknowledge the many efforts that contribute to achieving this goal. We are committed to supporting organizations and programs that can clearly demonstrate how their work aligns with and drives progress toward our top-level metric.

2. **Program Quality and Past Performance:** Applicants must thoroughly demonstrate the effectiveness of their program(s) in assisting low-income youth, youth with disabilities and/or underserved youth. The Foundation is also interested in the skills and training of program staff. Liberty Mutual Foundation supports organizations with a demonstrated track record of improving educational opportunities for young people.

3. **Organizational Capacity:** The Liberty Mutual Foundation Education Initiative aims to support high quality, direct services to youth through education-focused nonprofits. To that end, preference will be given to applicants that can demonstrate an established capacity for reaching underserved youth.
4. **Cost-effectiveness:** A budget for the program that demonstrates a cost-effective use of resources. The budget should clearly illustrate how grant funds will be used to reach the target number of students.

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. It is not intended that this funding should be the sole support of any proposed program.

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.

Reporting Requirements

- 1) A brief Metrics Verification Report (MVR), **due within 30 days of grant approval**, that will let organizations “level-set” by matching available funding, activity, and project data. MVRs are utilized to validate the metrics that will assess the impact of the grant once the awards have been distributed.
- 2) Interim Reports, **due May 1, 2026 and May 1, 2027**, required to access subsequent years’ funding.
- 3) A Final Report, **due May 1, 2028**, that specifically details the achievements, outcomes and opportunities made possible by this grant.

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

- **Accomplishments** achieved during the reporting period, including specific, measurable activities and outcomes as outlined in the initial grant proposal, and the number of children and youth served by the program (*interim and final reports*). ***Interim Reports will also require up to date financial reporting upon submission.***
- **Challenges or setbacks** experienced during the administration of the program, and how they were addressed by the organization (*final report only*).
- **Unexpected results or key insights** that were learned during the reporting period. Please take this section seriously as we hope to learn together. (*final report only*).

See the **Appendix** to this document for an example of an interim report.

Proposal Deadline and Grant Announcements

Proposals for the Liberty Mutual Foundation Education Initiative should be electronically submitted by 11:59 p.m. on April 18, 2025. Late applications, incomplete applications, missing financial documents, and applications not appropriately completed will not be considered.

Grant awards will be announced in June 2025.

Conference Call

Applicants are invited to participate in a Zoom webinar on **Wednesday, March 26, 2025, at 1:00 p.m. EDT/10:00 a.m. PDT** to answer questions related to the RFP requirements and process. This webinar is strongly recommended for new applicants but is not required to apply. The webinar will be recorded.

Register in advance for this webinar:

[Education RFP Webinar Registration Link](#)

After registering, you will receive a confirmation email containing information about joining the webinar.

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:

[2025-2027 Education 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. Requested Cash Amount

All figures in your proposal (Request amount, budget, number of participants to be served, anticipated outcomes, etc.) should reflect only ONE year of operations.

2. Project Title/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.

3. Community Needs, Target Population and Identifying Program Participants

What issue do you plan to address? What research supports your ideas? Please describe the criteria and processes that your organization uses to identify promising youth or students who may best benefit from the proposed services. Be certain to include a description of positive characteristics that you seek in prospective participants (e.g., high GPA or demonstrated interests in science) and challenges that you face in identifying and/or reaching your target population. Also share any methodology used that gathered input from program participants or their families and how you used that input for program planning.

4. Description of Project or Program

Please describe your program and how it will address one or more of the goals set forth by the Education Initiative:

- Creating equitable programs and initiatives to address learning loss
- Expanding academic opportunities for low-income and underserved students
- Train and prepare youth for pathways to college and/or career credentials

Include concrete and clear examples of how the proposed program will address the needs of the community or target population you identified above. How does your strategy differ from or complement that of other service providers addressing the same need? Provide information about your program's core services and, when appropriate, the service timeline.

5. Monitoring and Evaluation

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 lead toward the achievement of your stated goals. We encourage thoughtful connections linking the development of project metrics to monitoring and evaluation.

6. Activities and Outcomes

Please describe one or more specific program activities that address the goals of the Education Initiative. Construct your description using the following format:

Activity:	(What are you doing to achieve program goals?)
Expected Outcome:	(What are the benefits or changes over time that you expect to see?)
Baseline:	(How did you determine your expected outcomes?)
Measurement:	(How are you collecting and measuring your outcomes?)

Please provide estimated outcomes for your program across a set of predefined metrics; preferably outcomes that can be attributed to the specific dollar amount requested in your proposal.

NOTE: *Not all metric fields will be relevant to your program. If needed, you may create one or two of your own outcome metrics; however, we encourage you to use the Foundation's prompts when possible. Usually reporting on four goals per proposal is sufficient.*

If your request is funded, you will be asked to provide actual program outcomes when completing your interim and final impact reports. Also, based upon your award amount you can update your metrics when you develop the Metrics Verification Report.

See the **Appendix** for an example of the interim report, including an abbreviated list of predefined outcomes metrics.

7. Demographic Information Requested

- Total number served by the organization and by the program for which funds are requested
- Potential number of new participants
- 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

8. Financial Review Requirements

All RFP submissions include a financial review. As part of this review applicants will need to submit their most recent financials, including:

- Balance Sheet
- Statement of Activities (P&L)
- Independent Audit or Review (when required by law)

Additionally, applicants should be prepared to answer the following questions within the RFP, with responses being consistent with the information provided in the submitted financial documents. Please keep in mind that the following must be as of the most recent balance sheet.

- Total current assets
- Total current liabilities
- Total liabilities
- Total unrestricted net assets
- Current balance of cash accounts
- Net income for most recently completed fiscal year (provide context for deficit)
- Average cost per participant (based on overall program costs, not just grant request)
- List of other funding sources and grant amounts
- Any other context or financial information to support numbers provided

Definition of Terms:

- **Current Liabilities:** These are obligations that must be repaid within one year. Examples include accounts payable, accrued expenses, and short-term loans.
- **Noncurrent Liabilities:** Long-term obligations that are not due within the next year. Examples include long-term debt, long-term portion of liabilities, and any other liabilities that are due beyond 12 months
- **Total Liabilities:** 100% of the organization's total liabilities, including both current and noncurrent.
- **Net Assets:** The difference between total assets and total liabilities. In the context of nonprofits, net assets are categorized into unrestricted (funds that can be used at the discretion of the organization without specific limitations) and restricted net assets (funds designated for specific purposes or timeframes).

APPENDIX

Frequently Asked Questions

1. **Our organization received funding through the 2023-2024 cycle of the Education Initiative. Do we need to submit a final report before we can apply through the RFP?**

No. You do not need to submit a final report for your 2023-2024 Education Initiative grant **prior to** submitting a proposal through this RFP. A final report for your 2023-2024 grant is due by **May 1, 2025**, and you will receive instructions on when and how to access the online impact report via an email from CyberGrants. However, we do encourage prior Education Initiative grantees to complete their final reports as soon as possible, if they plan to participate in the current RFP cycle.

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 Education Initiative?**

No, we have a 12-month grant cycle rule which allows one grant per organization per 12-month cycle.

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

In addition to the City of Boston, we are also accepting applications from education organizations located in or serving residents of Brockton, Cambridge, Chelsea, Quincy, Somerville, Greater Puget Sound (Seattle), and select counties in Washington State.

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.

5. **Should our request amount and proposal information cover three full years of programming?**

No, the request amount and proposal information should reflect one year of programming.

6. **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.

7. **Is there an age limit on the young people we can serve through this grant?**

The majority of our Education Initiative partners serve young people aged 14-24.

Education Initiative Interim Reports (for years 1 & 2)

1. **Start Report Period / End Report Period**
Please enter the start and end dates for the reporting period included in this impact report.
2. **Future Operation**
Given the current success (or challenges) experienced during the grant period, how likely is it that the program funded by this Education Initiative grant will continue to operate over the next 12 months?
3. **Cost of Supported Program**
Please provide an updated total cost for the program during Year 1 of this grant. If funds were applied toward operating support, provide an update of your agency's operating budget.
4. **Most Recent Statement of Activities & Balance Sheet**
Please provide your organization's most recent statement of activities and balance sheet.
5. **Program Activity (1) Outcomes**
Referring to the **first** Program Activity and Expected Outcomes described in your application, please provide the **Actual Outcomes** achieved because of this activity during the reporting period.
6. **Program Activity (2) Outcomes**
Referring to the **second** Program Activity and Expected Outcomes described in your application (if any), please provide the **Actual Outcomes** achieved because of this activity during the reporting period.
7. **Program Activity (3) Outcomes**
Referring to the **third** Program Activity and Expected Outcomes described in your application (if any), please provide the **Actual Outcomes** achieved because of this activity during the reporting period.
8. **Education Metrics – Outcomes**
Referring to the following predefined metrics and your program's anticipated outcomes, please update the following metric fields with **actual outcomes** achieved during the reporting period.
 - # of students supported to enter a 2- or 4-year college
 - # of students supported to enter a vocational or technical training program
 - # of students graduating college within 6 years
 - # of students improving literacy and/or numeracy (measured by standard assessment tool)
 - # of English Language Learner students achieving proficiency (measured by standardized test)